



Level 2 Self-Assessment Checklist

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This document is checklist of practical skills and areas of knowledge that students are required to be taught during an EFT International Level 2 training course. EFTi encourages students to utilize this checklist to self-assess their knowledge and understanding of Level 2 material.

About the Checklist:

The three columns (noted/understood/able to explain) represent three stages in learning:

1. **Noted** means you have been made aware of something and taken note of it, but you may still be unsure of it, and therefore need more study or practice time
2. **Understood** means you understand something, but you may struggle to explain it well when you talk about it to someone else, or you may need to look part of it up
3. **Able to Explain** means you know and understand sufficiently well to explain it to someone else, usually from memory

Tick whichever of the three columns applies when you self-assess. Revisit at a later date to see if you can tick more columns. Raise any questions that you may have about these topics with your Trainer as needed.

EFT Level 2 Training

Level 2 training in EFT is a pre-requisite for EFTi Certification and Accreditation as an EFT Practitioner. Certification and Accreditation are not awarded until the candidate has also completed all of the post-Level 2 assessment and mentoring requirements.

While practicing the techniques and completing case studies, Level 2 candidates may work with friends, family and other individuals as non-paying “clients”, unless otherwise qualified as a coach, counselor or mental health professional. The Training Points listed below are taken from the *EFTi Level 2 Training Points and Learning Outcomes* document and defined in the *EFTi Glossary of Terms*.

Training Points	Learning Outcomes Students should be able to...	Noted	Understood	Able to Explain:
Review of Basic Knowledge and Skills (Level1)	<ul style="list-style-type: none"> Understand and apply the knowledge and practical skills gained at EFT Level 1 <p>See <i>EFTi Level 1 Self-Assessment Checklist</i></p>			
Don't Go Where you Don't belong	<ul style="list-style-type: none"> Discern the scope of practice at Level 2 (including which client cases are or <i>are not</i> suitable for work at this level) 			
	<ul style="list-style-type: none"> Understand there are legal limitations of practice at this level 			
	<ul style="list-style-type: none"> Understand that the client may have limited capacity to handle strong emotion 			
	<ul style="list-style-type: none"> Understand your own capacity and limitations as a Level 2 Student or Practitioner-Candidate 			
	<ul style="list-style-type: none"> Understand the importance of referring a client onwards if needed 			
	<ul style="list-style-type: none"> Know who to refer to when needed <p>See <i>EFTi Glossary of Terms</i> for more information</p>			

More About the Trauma Experience	<ul style="list-style-type: none"> Understand in simple terms the effect of traumatic events on body and mind 			
	<ul style="list-style-type: none"> Understand the ways that a traumatic event can affect a person in many ways for extended periods of time 			
	<ul style="list-style-type: none"> Understand the purpose of and relationships between fight/fight/freeze/flop reactions 			
	<ul style="list-style-type: none"> Understand why gentle approaches (and proceeding slowly) are essential when working with traumatic events 			
The Gentle Techniques	<ul style="list-style-type: none"> Understand and be able to use Tearless Trauma Technique to reduce emotional intensity 			
	<ul style="list-style-type: none"> Understand and be able to use Sneaking Up/Sneaking Away to work with peripheral aspects of a Trauma 			
	<ul style="list-style-type: none"> Understand and be able to use Body Sensations as a metaphor for trauma encoded into the body – for the purpose of being gentle 			
	<ul style="list-style-type: none"> Understand and be able to use Boxing/Container technique(s) both within a session and at the end of a session to maintain client safety 			
The Movie/Tell the Story Technique for Level 2	<ul style="list-style-type: none"> Understand and be able to use Movie/Tell the Story Technique to identify, safely and gently work through a traumatic event and test for resolution 			
	<ul style="list-style-type: none"> Understand and be able to use Movie/Tell the Story in several nuanced ways to give protective distancing (e.g. tapping for the title first until it is <i>as low as it will go</i>, keeping the title far away) Understand how to assist a client to create a 			

	<p>title and tap with the title, and create a short, specific movie/story from a longer one</p>			
	<ul style="list-style-type: none"> • Understand how Movie/Tell the Story Technique relates to the EFT process as a whole • Understand how Movie/Tell the Story Technique is working at the level of Specific Past Events, and how this is a cornerstone of EFT 			
Abreactions	<ul style="list-style-type: none"> • Understand the concept of an Abreaction as a normal part of EFT processing 			
	<ul style="list-style-type: none"> • Understand how to calibrate the client and use the Gentle Techniques to minimize the chance of an Abreaction occurring 			
	<ul style="list-style-type: none"> • Understand and be able to support a client through an abreaction if one occurs 			
	<ul style="list-style-type: none"> • Recognize your own triggers if you react to a highly emotional client and do the personal work to clear them 			
Rapport Skills	<ul style="list-style-type: none"> • Understand the importance of gaining and maintaining Rapport in the client relationship 			
	<ul style="list-style-type: none"> • Use body language, questions and reflective language to build or rebuild rapport 			
	<ul style="list-style-type: none"> • Understand the importance of checking-in with the client (reality check) periodically to find out if the words in use and approaches are appropriate for that client 			
Writing on the Walls Metaphor and Introduction to Limiting Beliefs	<ul style="list-style-type: none"> • Understand what is meant by Writing on the Walls and how it relates to Core issues 			
	<ul style="list-style-type: none"> • Understand the relationship between Writing on the Walls and the development of limiting beliefs 			

	<ul style="list-style-type: none"> • Ask questions to identify a limiting belief (and potentially work out how it may have originated) 			
	<ul style="list-style-type: none"> • Apply EFT to address and potentially resolve a limiting belief (e.g. tapping on the answers to the questions above) 			
Identifying and Handle Core Issues, and the “Tabletops” Metaphor	<ul style="list-style-type: none"> • Understand and explain how the Tabletop metaphor relates to Core issues 			
	<ul style="list-style-type: none"> • Identify and handle a global core issue using EFT (see Introduction to Limiting Beliefs, above) 			
	<ul style="list-style-type: none"> • Understand how Core issues relate to presenting issues 			
	<ul style="list-style-type: none"> • Use appropriate questions to uncover and identify table legs (Specific Past Events) 			
	<ul style="list-style-type: none"> • Be able to use appropriate questions to uncover and identify Tabletops which may be stacked on top of or related to others 			
Handling Specific Past Events, and the “Table Legs” Metaphor	<ul style="list-style-type: none"> • Use “Sneak Up” and “Sneaking Away” as gentle approaches 			
	<ul style="list-style-type: none"> • Understand how the Table Legs metaphor applies to Specific Past Events 			
	<ul style="list-style-type: none"> • Understand how specific events (Table Legs) may support the Core issue or the presenting global issue 			
	<ul style="list-style-type: none"> • Identify and work with Aspects of a specific past experience 			
Reversals (and Secondary Gains):	<ul style="list-style-type: none"> • Understand there are reasons why Reversals (including secondary gain) may be in place and begin to explore what those reasons may be 			

More About When EFT Doesn't Work	<ul style="list-style-type: none"> Recognize the presence of Reversals and the ways that they might manifest 			
	<ul style="list-style-type: none"> Recognize how Reversals (including secondary gain) can interfere with the EFT process 			
	<ul style="list-style-type: none"> Ask non-judgmental questions to identify Reversals and then address them 			
Introduction to Using EFT by Phone or Video Conferencing	<ul style="list-style-type: none"> Know the benefits and challenges of working via phone or video-conference 			
	<ul style="list-style-type: none"> Understand how to prepare a client for a phone or video session (equipment, technical information, other information) 			
	<ul style="list-style-type: none"> Work with a client via phone or video session in a safe and supportive way 			
“Getting Out of Your Own Way” and Introduction to using Intuition	<ul style="list-style-type: none"> Understand how and when practitioners may “get in their own way” and interfere with the client’s process 			
	<ul style="list-style-type: none"> Recognize the difference between imposing an agenda (ego-centric) and using intuitive input appropriately 			
	<ul style="list-style-type: none"> Know how to listen and reflect client’s words accurately without imposing any agenda 			
	<ul style="list-style-type: none"> Know how to check-in with a client (reality check) to find out if the words and methods chosen are appropriate for that client. 			
More on Testing and Testing for Tail-Enders	<ul style="list-style-type: none"> Describe and use several ways to test results 			
	<ul style="list-style-type: none"> Spot Tail-Enders (“Yes, but...” statements) and find the obstacles to progress that they represent 			

	<ul style="list-style-type: none"> • Work appropriately with Tail-Enders as they show up 			
Calibration of the client	<ul style="list-style-type: none"> • Observe and recognize the importance of the client`s subtle cues (verbal and non-verbal) 			
	<ul style="list-style-type: none"> • Adjust the EFT process (methods in use/timing/pace) to remain in Rapport with the client 			
Integrating Cognitive Shifts (Client Reframes)	<ul style="list-style-type: none"> • Recognize from language and body language when a client has had a Cognitive Shift 			
	<ul style="list-style-type: none"> • Help the client to recognize the shift that has occurred 			
	<ul style="list-style-type: none"> • Integrate the shift in the standard Setup appropriately (e.g. into the second part of the EFT Setup or sparingly into the Sequence) 			
Introduction to Reframing (Practitioner Reframes)	<ul style="list-style-type: none"> • Understand why Practitioner reframes should be used sparingly at this level of practice 			
	<ul style="list-style-type: none"> • Understand why Client reframes (Cognitive Shifts) are preferable 			
	<ul style="list-style-type: none"> • Understand the difference between imposing the practitioner`s agenda and providing a Reframe that “lands” (e.g. is readily acceptable to the client) 			
Preframing	<ul style="list-style-type: none"> • Know how to Preframe appropriately to let a client know what to expect in a session 			
	<ul style="list-style-type: none"> • Know how to Preframe appropriately to help manage the client`s expectations 			
Role of “The Positive” in EFT	<ul style="list-style-type: none"> • Know when to introduce positive language into the EFT process 			

	<ul style="list-style-type: none"> Understand why inappropriate positive language can be harmful to rapport or impede progress during a session 			
	<ul style="list-style-type: none"> Be able to use suitable positive language within the Setup affirmation to remind clients of a chosen focus (e.g. proper flexing) 			
	<ul style="list-style-type: none"> Be able to use positive language to test for Tail-Enders and/or Reversals 			
	<ul style="list-style-type: none"> Be able to use positive language to assist integration of Cognitive Shifts 			
	<ul style="list-style-type: none"> Be able to use positive language appropriately at the end of a session to achieve a sense of safety (i.e. palliative language) 			
Introduction to Tapping with Children	<ul style="list-style-type: none"> Understand there are legal and ethical considerations about working with children and how these must apply in the country/state where the work will be done 			
	<ul style="list-style-type: none"> Understand importance of setting up and managing a session with a minor to maintain safety and confidentiality 			
	<ul style="list-style-type: none"> Understanding why tapping with the parents/guardians first is good practice, and involvement of the parent/guardian in the process is essential 			
	<ul style="list-style-type: none"> Knowing the importance of meeting the child where they are and using language appropriate to the age of the child 			
Introduction to Surrogate Tapping	<ul style="list-style-type: none"> Know and be able to use the EFTi standard protocol for Surrogate Tapping 			
	<ul style="list-style-type: none"> Know the importance of addressing our own feelings/agenda about another person/animal before working with them surrogate 			

	<ul style="list-style-type: none"> • Understand the ethical concerns of working surrogate 			
Introduction to Tapping with Animals	<ul style="list-style-type: none"> • Understand the practical difficulties of tapping directly on an animal 			
	<ul style="list-style-type: none"> • Recognize that surrogate work is often a better option 			
	<ul style="list-style-type: none"> • Understand why tapping with the animal's owner first is good practice (see Surrogate Tapping) 			
	<ul style="list-style-type: none"> • Understand there is a legal and ethical framework around working directly with animals 			
Introduction to Working with Groups	<ul style="list-style-type: none"> • Recognize that knowledge of facilitating group work is gained by experience 			
	<ul style="list-style-type: none"> • Understand the different forms of Group work: Groups with a specific focus Groups with no specific focus Borrowing Benefits while watching a demonstration on one group member 			
	<ul style="list-style-type: none"> • Understand the need to be able to deliver an effective and appropriate demonstration within a set time-frame 			
	<ul style="list-style-type: none"> • Understand the need for all group members to have their own experience of tapping 			
	<ul style="list-style-type: none"> • Set-up and manage a group session effectively while maintaining safety and confidentiality 			
More on Borrowing	<ul style="list-style-type: none"> • Understand and explain what Borrowing Benefits is and how it might work 			

Benefits	<ul style="list-style-type: none"> • Use Borrowing Benefits individually or as part of a group experience 			
Additional Tapping Points	<ul style="list-style-type: none"> • Locate and use the additional tapping points (fingers, gamut, wrist, liver, thymus) appropriately and safely 			
	<ul style="list-style-type: none"> • Understand how they relate to the meridian system 			
Additional Tapping Strategies	<ul style="list-style-type: none"> • Know and use the 9-Gamut sequence appropriately 			
	<ul style="list-style-type: none"> • Know and use Touch and Breathe appropriately 			
	<ul style="list-style-type: none"> • Know and use the Floor to Ceiling Eye-roll appropriately <p><i>See EFTi Glossary of Terms</i></p>			
The Importance of Practitioner Self-Care and the Personal Peace Procedure	<ul style="list-style-type: none"> • Know the importance of self-care in EFT practice (e.g. Getting out of the way, “Do not go where you don’t belong”) 			
	<ul style="list-style-type: none"> • Understand the importance of using the Personal Peace procedure regularly for ongoing self-clearance (i.e. “Doing your own work”) 			
	<ul style="list-style-type: none"> • Understand the importance of session swaps or booking a professional session to facilitate ongoing self-clearance (i.e. “Doing your own work”) 			
	<ul style="list-style-type: none"> • Understand the need for ongoing mentoring to develop and encourage skillful and appropriate use of EFT 			
	<ul style="list-style-type: none"> • Understand the EFTi rules and regulations about receiving adequate and appropriate mentoring 			

	See <i>EFTi Mentoring Handbook</i>			
Safety: Professional and Ethical Considerations for Practitioner and Client	<ul style="list-style-type: none"> Understand the importance of professional behaviour and conduct for EFT Practitioners 			
	<ul style="list-style-type: none"> Be familiar with and understand the <i>EFTi Code of Conduct and Ethics</i>, including the sections on safe practice and dealing with a complaint 			
	<ul style="list-style-type: none"> Understand that support is offered to EFT Practitioners by EFTi Trainers, Approved Mentors and the various EFTi officials 			
	<ul style="list-style-type: none"> Understand the need to work appropriately with a client to maintain safety for both parties <p>See <i>EFTi Mentoring Handbook</i></p>			
Limitations to Level 2 Practice	<ul style="list-style-type: none"> Understand when it is not appropriate to work with certain client groups 			
	<ul style="list-style-type: none"> Understand the need for ongoing practice and further training to be able to work with certain client groups 			
	<ul style="list-style-type: none"> Understand the need to refer on clients who are beyond the practitioners current level of skill and confidence 			

Notes: