

## Pastoral Skills Training Family Life Course

### Lesson 1: The Intake Process

#### Student Guide

Lesson Objectives	
<p>Recognize techniques that contribute to a successful intake interview.</p> <ul style="list-style-type: none"><li>○ Identify basic attending skills.</li><li>○ Identify the principles of confidential communication.</li><li>○ Protect confidentiality as you practice pastoral care and counseling.</li></ul>	
Session 1: Presentation Webinar	
Part 1	The Initial Interview
Part 2	Confidentiality
Student Readings	
Initial Interview Questions	01-initial-interview-questions.pdf
Case Study	01-case-study.pdf
Session 2: Discussion Webinar	
A discussion of the assigned case study	

# The Intake Process

Lesson 1

Pastoral Skills Training  
Family Life Course  
Phase 1  
USACHCS

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## The Intake Process



### Objectives

- Recognize techniques that contribute to a successful intake interview:
  - Identify basic attending skills.
  - Identify the principles of confidential communication.
  - Protect confidentiality as you practice pastoral care and counseling.

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## The Intake Process



PART 1:

# The Initial Interview

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### The Intake Process



#### The Purposeful Interview

- ▶ In any initial interview, perhaps the most important criterion for success is that the participants understand that this is a safe place.
- ▶ The chaplain's goal is to help the Soldier clarify what the problem is and to find some hope for either fixing or coping with the problem.
- ▶ Communication flows in both directions.
- ▶ Everything the chaplain does conveys to the client what the chaplain thinks is important and related to achieving the client's goals.
- ▶ The chaplain and the Soldier/family form a team based on mutual trust and cooperation.

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### The Intake Process



#### Attending Behavior

- ▶ Eye contact
- ▶ Attentive body language
- ▶ Vocal style
- ▶ Verbal following
- ▶ Matching behavior

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### The Intake Process



#### Open Invitation to Talk

- ▶ A key task of the interviewer is to encourage the client to speak up, describe the situation, and define the issue.
- ▶ This task includes the use of open-ended questions, for example:
  - ▶ Could you tell me a bit more about that?
  - ▶ Tell me how you got through that ... ?
  - ▶ When you say it hurt, what was done to hurt you?

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### The Intake Process



#### Encourage Participation

- Once the invitation to talk has been extended, additional techniques can keep the client communicating with you.
  - Minimal encouragement
    - Paraphrase
    - Reflection of feeling
    - Probing questions
    - Leverage questions
    - Goal identification

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### The Intake Process



#### Encourage Participation

- Minimal encouragement
  - Ex: Oh? So? Then what? And? What else? Tell me more ...
- Paraphrase
  - Ex: So what you're saying is ...
  - Ex: Let me tell you what I heard you say ...
- Reflection of feeling
  - Ex: It sounds like you're feeling sad. Is that what you would call it?

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### The Intake Process



#### Encourage Participation

- Probing questions
  - Ex: Can you be more specific about how the confrontation started with your boss?
- Leverage questions
  - Ex: How is this a problem for you?
- Goal Identification
  - Ex: So your goal is to be able to handle and deal with situations like this one with your boss more effectively.

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**The Intake Process**



QUESTIONS?

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**The Intake Process**



**Check on Learning**

- How does paraphrasing improve counselor/client communication?
- What is the purpose of minimal encouragement?
- What defines success for an initial interview?
- What kinds of things might we do to encourage people to speak up?

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**The Intake Process**



**PART 2:**  
**Confidentiality**

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### The Intake Process



#### Confidential Communication

- Any communication to a chaplain or chaplain assistant given as a formal act of religion or as a matter of conscience.
- Communication not intended to be disclosed to third-party persons in any context, legal or otherwise.

#### Privileged Communication

- Information that is not admissible in a court or legal action
- Confidential communication is generally considered privileged

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### The Intake Process



#### Sensitive Information

- Any non-confidential communication that involves personally sensitive information that would be an inappropriate subject for general dissemination
- Protect as much as possible

**Privileged**  
Legal term  
Ex: Court testimony

**Confidential**  
Ex: Soldier is in counseling  
Ex: Info to a social worker

**Sensitive**  
Ex: Attends Alcoholics Anon.  
Ex: Medical Information

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### The Intake Process



#### Foundations of Confidential Communication

- The greater good of society
- Supreme Court decisions
- Military Rules of Evidence 503
- Army Regulation 165-1

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### The Intake Process

#### The Greater Good of Society

- ▼ Certain relationships are protected:
  - ▼ Husband/wife
  - ▼ Attorney/client
  - ▼ Doctor/patient
  - ▼ Counselor/client
- ▼ Reason: The potential good that comes from people coming forward and eventually getting help outweighs potential harm or danger from allowing certain relationships to be protected.

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### The Intake Process

#### Supreme Court Decisions

- ▼ The U. S. Supreme Court has recognized "the human need to disclose to a spiritual counselor, *in total and absolute confidence*, what are believed to be flawed acts or thoughts and to receive priestly consolation and guidance in return."
  - ▼ *Trammel v. U.S.*, 445 U.S. 40 (1980)
- ▼ "The privilege regarding communications with a clergyman reflects an *accommodation* between the *public's right to evidence* and the *individual's need* to be able to speak with a spiritual counselor, in absolute confidence, and disclose the wrongs done or evils thought and receive spiritual absolution, consolation, or guidance in return."
  - ▼ *U.S. v. Moreno*, 20 M.J. 623, 626 (A.C.M.R. 1985)

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### The Intake Process

#### Military Rules of Evidence 503

- ▼ General rule of privilege: "A person has a privilege to refuse to disclose and to prevent another from disclosing a confidential communication by the person to a clergyman or a clergyman's assistant, if such communication is made either as a formal act of religion or as a matter of conscience."

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### The Intake Process



#### Chief of Chaplains Policy Key Points

- Confidentiality is absolute: NO STATED EXCEPTIONS.
- Applies to statements made to chaplains and anyone working for a chaplain.
- Reveal info ONLY when written consent given.
  - There is no blanket "informed consent" of release from confidentiality.
- Avoid incompatible tasks (like sexual assault coordinator) where a chaplain might be thought to be required to report something.
- Protect files, and destroy as soon as no longer needed.
- The relationship between a chaplain, assistant, and supervisors is NOT confidential.

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### The Intake Process



#### General Rules

- Until you know otherwise, assume that the person considers this to be a matter of religion or conscience and intends this to be confidential.
- It is his/her intention, not your theology, that determines whether this is confidential or not.
- This is not a lawyer's call. Do not speak even if a lawyer suggests that it isn't confidential.
- Unless you are absolutely sure something is not confidential, do not speak.

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### The Intake Process



#### Exceptions

- Person voluntarily waives confidentiality:
  - Not coerced
  - Signed, dated, and witnessed
  - Must be given AFTER the information is shared
- Conscientious Objector interview: AR 600-43, 2-3 (a) specifically states that the information provided to the chaplain conducting the investigation is not privileged. However, ensure Soldiers understand this before beginning an interview. (This is a specialized case.)
- There are no other exceptions. Confidentiality is absolute, regardless of the severity of the situation.

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### The Intake Process



#### Severe Situations

- ▮ If anyone is in immediate danger, do everything possible to immediately lower the risk of harm to others or the individual.
- ▮ Contact your chaplain supervisor for advice.
- ▮ Contact the family life chaplain.
- ▮ Encourage the individual to take appropriate actions to resolve the situation.
- ▮ But even in severe situations, DO NOT break confidentiality without a waiver.

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### The Intake Process



#### Confidential Communication With Chaplain Personnel

- ▮ Communications regarding constituents:
  - ▮ Chaplains often consult with supervisory chaplains to ensure best care.
  - ▮ When a chaplain consults with her/his supervisor regarding a parishioner, confidentiality extends to the supervisor.
- ▮ Privilege DOES NOT exist between a chaplain and a chaplain assistant or a chaplain supervisor when discussing personal and professional issues.
- ▮ Policy that governs confidential communication DOES NOT apply to chaplain candidates.

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### The Intake Process



#### Confidential or Not?

- ▮ **Scenario 1:** Sergeant calls chaplain in: "I think PVT Jones is suicidal: Can you talk with him and tell me what is happening?"
- ▮ **Scenario 2:** Unit chaplain calls state support chaplain who is seeing a Soldier in unit chaplain's battalion. He asks: "Are you seeing Jones? Is Jones suicidal?" Does the state support chaplain tell the unit chaplain?
- ▮ **Scenario 3:** What about taping counseling or doing a verbatim for CPE training, or to consult with a family life chaplain?
- ▮ **Scenario 4:** During marriage counseling, the wife tells the chaplain: "My husband hit our child and caused bruises." Is the information still protected even though there is a third person (wife and husband and counselor) in the room?

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### The Intake Process



#### Confidential or Not?

- Scenario 5: Commander asks: "Chaplain, I'm not going to prosecute Jones, so this isn't a legal issue. I don't think it's privileged, I just want to help. Tell me what's happening in his marriage."
- Scenario 6: Soldier tells you: "I hate SGT Johnson, and have thought about killing him at the range tomorrow."
- Scenario 7: Social worker tells you: "In this state, clergy are mandated reporters of child abuse and elder abuse. I need to know if Mr. Jones has admitted to you that he hit his children."
- Scenario 8: Chaplain: "My denomination/endorser requires me to report in cases of child/sexual abuse" or "I am a licensed therapist. The code of ethics requires me to report."

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### The Intake Process



#### Confidential or Not?

- Scenario 9: Wife in counseling (just chaplain and wife): "My husband has been having sex with our 12-year-old daughter. He'll kill me if he thinks I reported him. Will you go to the police and report this to them?"
- Scenario 10: Soldier tells you information in a corner of a crowded room. Is that privileged?

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### The Intake Process



# QUESTIONS?

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