

Entry-Level Occupational Competencies for the Practice of Traditional Chinese Medicine in Canada

**Draft
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Canadian Alliance of Regulatory Bodies for TCM Practitioners and Acupuncturists

INTRODUCTION

The Occupational Competencies were developed by the Canadian Alliance of Regulatory Bodies for Traditional Chinese Medicine Practitioners and Acupuncturists over the period January 2008 – October 2009.

The development process involved the identification of proposed competencies by an inter-provincial committee of experienced Traditional Chinese Medicine (TCM) practitioners and educators, working with a consultant. The committee utilized source documents from various countries describing TCM education and practice, as well as the expertise of its members.

This was followed by surveys of practitioners in British Columbia, Alberta, Ontario, Québec and Newfoundland & Labrador, to determine the extent to which the proposed competencies were deemed by practitioners to be important, frequently-used and appropriate as entry-level requirements.

The Occupational Competencies are subject to the approval of the regulatory authority in each jurisdiction. They are intended to identify the job tasks in which entry-level TCM practitioners and acupuncturists should be proficient, in order to provide safe, effective and ethical practice.

The Alliance is currently developing sub-competencies and performance indicators for the Occupational Competencies, which will enable the creation of a pan-Canadian registration examination, as well a framework of learning outcomes to be expected of education programs preparatory to entry-to-practice.

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OCCUPATIONAL COMPETENCIES AND ENTRY-LEVEL PROFICIENCY

An Occupational Competency is defined as

A job task that can be carried out to a specified level of proficiency

The following statement defines Entry-Level Proficiency

When presented with routine situations, the entry-level practitioner applies each relevant competency in a manner consistent with generally accepted standards in the profession, without supervision or direction, and within a reasonable timeframe. The practitioner selects and applies competencies in an informed manner. The practitioner anticipates what outcomes to expect in a given situation, and responds appropriately.

The entry-level practitioner recognizes unusual, difficult to resolve and complex situations which may be beyond his / her capacity. The practitioner takes appropriate and ethical steps to address these situations, which may include seeking consultation or supervision, reviewing research literature, or referring the client.

Development beyond entry-level proficiency is to be encouraged. This involves Advanced Skills, Expert Skills and Leadership:

The practitioner working at an advanced level has extensive experience and exhibits a more in-depth understanding of clinical situations. Decision-making and treatment flow more efficiently because the practitioner readily perceives which aspects of a presenting situation are the important ones, and how they should be addressed. The practitioner working at an advanced level deals effectively with most unusual, difficult to resolve and complex situations.

Beyond the advanced level, practitioners may be recognized as experts or leaders in their fields, who contribute to the advancement of the profession.

FRAMEWORK FOR THE OCCUPATIONAL COMPETENCIES

The Occupational Competencies are grouped into the following Practice Areas

1. Interpersonal Skills
2. Professionalism
3. Practice Management
4. Traditional Chinese Medicine Foundations
5. Fundamentals of Biomedicine
6. Diagnostics and Treatment
7. Acupuncture Techniques
8. Herbal Dispensary Management
9. Safety

Within each Practice Area, the Occupational Competencies are identified as

Common (applicable to both Acupuncture and Herbology)
Acupuncture (unique to the practice of Acupuncture)
Herbology (unique to the practice of Herbology)

PRACTICE AREA 1 - INTERPERSONAL SKILLS

Occupational Competencies		Common	Acupuncture	Herbology
1.1	Utilize professional communication.			
a	Speak clearly and concisely using plain language, and /or medical terminology, and / or TCM terminology, as appropriate.	✓		
b	Write clearly and concisely using plain language, and /or medical terminology, and / or TCM terminology, as appropriate.	✓		
c	Comprehend written information presented in plain or technical language.	✓		
d	Comprehend oral communication presented in plain or technical language.	✓		
e	Confirm recipient understands communication.	✓		
f	Distinguish between professional and personal opinions.	✓		
g	Respond to non-verbal communication.	✓		
h	Respond to sources of interpersonal conflict.	✓		
1.2	Develop and maintain effective inter-professional relationships.			
a	Identify the functions of other service providers commonly encountered in the health care setting.	✓		
b	Show respect to colleagues and to other service providers.	✓		
c	Develop productive working relationships.	✓		
d	Address professional differences that may lead to conflict.	✓		
e	Work cooperatively in an interdisciplinary health care setting.	✓		
f	Facilitate consultation, collaboration and referral when of benefit to the patient.	✓		

PRACTICE AREA 1 - INTERPERSONAL SKILLS

Occupational Competencies		Common	Acupuncture	Herbology
1.3	Develop and maintain effective relationships with patients.			
a	Show respect toward patients as individuals.	✓		
b	Respect diverse cultures and choices.	✓		
c	Exhibit compassion toward patients.	✓		
d	Maintain practitioner / patient boundaries.	✓		
e	Facilitate honest, reciprocal communication.	✓		
f	Explain the role of acupuncture in patient's overall health care.		✓	
g	Explain the role of TCM herbal treatment in patient's overall health care.			✓
h	Encourage patient to take responsibility for his / her health.	✓		

PRACTICE AREA 2 - PROFESSIONALISM

Occupational Competencies		Common	Acupuncture	Herbology
2.1	Comply with legal requirements.			
a	Apply to practice current, relevant federal and provincial / territorial legislation.	✓		
b	Apply to practice current requirements of regulatory body.	✓		
c	Apply to practice current, relevant requirements of municipal and other local authorities.	✓		
2.2	Practice in a manner that accords patient dignity and reflects patient rights.			
a	Ensure that patient is aware of treatment plan, its benefits and risks.	✓		
b	Ensure that patient consents to treatment.	✓		
c	Maintain patient confidentiality.	✓		
d	Involve patient support person / guardian / advocate, when indicated.	✓		
e	Ensure patient privacy.	✓		
f	Ensure patient draping.	✓		
g	Terminate course of treatment when appropriate.	✓		
h	Advise patient on self-care and health maintenance.	✓		
i	Provide patient with options for continuity of care.	✓		
j	Respect patients' rights to access the health care of their choice.	✓		
2.3	Maintain practitioner self-care.			
a	Maintain personal health and wellness in the context of professional practice.	✓		
b	Maintain personal hygiene.	✓		
c	Maintain professional appearance.	✓		

PRACTICE AREA 2 - PROFESSIONALISM

Occupational Competencies		Common	Acupuncture	Herbology
2.4	Evaluate and improve professional performance.			
a	Practice within limits of expertise.	✓		
b	Undertake critical self-reflection of performance.	✓		
c	Modify practice to enhance effectiveness.	✓		
d	Take responsibility for professional actions.	✓		
e	Remain current with developments in acupuncture practice.		✓	
f	Remain current with developments in TCM herbology practice.			✓

PRACTICE AREA 3 - PRACTICE MANAGEMENT

Occupational Competencies		Common	Acupuncture	Herbology
3.1	Maintain patient records.			
a	Ensure complete and accurate clinical records.	✓		
b	Ensure complete and accurate financial records.	✓		
c	Ensure that records are legible.	✓		
d	Ensure patient access to records.	✓		
e	Ensure physical security and integrity of records.	✓		
f	Ensure privacy and confidentiality of records.	✓		
g	Ensure preservation of records, and destruction according to law or regulation.	✓		
3.2	Employ effective business practices.			
a	Ensure sound financial management.	✓		
b	Communicate fee and payment policies to patient in advance.	✓		
c	Maintain ethical billing practices.	✓		
d	Ensure professional liability and malpractice insurance.	✓		
e	Employ ethical advertising.	✓		
f	Establish office procedures and supervise staff accordingly.	✓		

PRACTICE AREA 4 – TRADITIONAL CHINESE MEDICINE FOUNDATIONS

Occupational Competencies		Common	Acupuncture	Herbology
4.1	Apply fundamental knowledge of the following Traditional Chinese Medicine principles in diagnosis and treatment.			
a	yin yang	✓		
b	wu xing (five elements)	✓		
c	zang xiang (organ theories)	✓		
d	jing-luo & shu xue (channels, collaterals, and acupuncture points)	✓		
e	qi, xue, jin ye, jing, & shen (vital substances: energy, blood, body fluid, essence, spirit)	✓		
f	ti zhi (body constitution, characteristics; genetic and environmental factors)	✓		
g	bing yin (etiology)	✓		
h	bing ji (pathogenesis)	✓		
i	yu fang (prevention)	✓		
j	zhi ze (principles of treatment)	✓		
k	yang sheng (life preservation - diet, exercise, lifestyle)	✓		
4.2	Apply fundamentals of acupuncture in diagnosis and treatment.			
a	Locate the following points, referring to World Health Organization standard acupuncture nomenclature:			
i	jing xue (points of the 14 channels)		✓	
ii	jing wai qi xue (extra points)		✓	
b	Apply knowledge of the following special groupings of points, in treatment planning:			
i	wu shu xue (five transporting points)		✓	
ii	yuan xue (primary, source points)		✓	
iii	luo xue (connecting points)		✓	
iv	xi xue (cleft points)		✓	

PRACTICE AREA 4 – TRADITIONAL CHINESE MEDICINE FOUNDATIONS

Occupational Competencies		Common	Acupuncture	Herbology
v	<i>bei shu xue</i> (back / shu points)		✓	
vi	<i>mu xue</i> (front / mu points)		✓	
vii	<i>xia he xue</i> (lower he / sea points)		✓	
viii	<i>ba mai jiao hui xue</i> (eight confluent points)		✓	
ix	<i>ba hui xue</i> (eight influential points)		✓	
x	<i>zi mu xue</i> (mother / child points)		✓	
xi	<i>jiao hui xue</i> (channel meeting points)		✓	
xii	<i>a shi xue</i> (ah shi points)		✓	
xiii	acupuncture micro-systems, including the ear		✓	
c	Select points for assessment, based upon <i>jing-luo</i> theory and patient presentation.		✓	
d	Select points or areas for therapy, based upon patient presentation.		✓	
e	Apply knowledge of local anatomy, functions, indications, precautions and contraindications for selection of points and areas for therapy.		✓	
f	Select stimulation techniques.		✓	
g	Apply knowledge of precautions and contraindications for application of stimulation techniques.		✓	
h	Apply knowledge of:			
i	<i>tui na / an mo</i> (including acupressure)		✓	
ii	<i>qi gong / tai ji</i>		✓	
iii	<i>gua sha</i>		✓	

PRACTICE AREA 4 – TRADITIONAL CHINESE MEDICINE FOUNDATIONS

Occupational Competencies		Common	Acupuncture	Herbology
4.3	Apply knowledge of the following properties and functions of TCM herbs in treatment planning:			
a	<i>si qi</i> (four natures)			✓
b	<i>wu wei</i> (five flavours)			✓
c	<i>sheng jiang fu chen</i> (directions)			✓
d	<i>gui jing</i> (meridian entry)			✓
e	actions			✓
f	indications			✓
g	toxicity			✓
h	<i>pao zhi</i> (effect of processing)			✓
4.4	Apply knowledge of herbal formulating strategies, with reference to:			
a	composition of formula			✓
b	modification of formula			✓
c	functions & classifications			✓
d	combinations & compatibility			✓
e	dosage form & methods of administration			✓
f	dosage			✓
g	potential adverse effects			✓
h	contraindications & precautions			✓

PRACTICE AREA 4 – TRADITIONAL CHINESE MEDICINE FOUNDATIONS

Occupational Competencies			Common	Acupuncture	Herbology
4.5		Apply knowledge of the following herb interactions in treatment planning:			
a		herb – drug interactions			✓
b		herb – herb interactions			✓
c		herb – food interactions			✓
d		herb – natural health product interactions			✓

PRACTICE AREA 5 - FUNDAMENTALS OF BIOMEDICINE

Occupational Competencies		Common	Acupuncture	Herbology
5.1	Apply basic biomedical concepts to TCM practice.	✓		
5.2	Relate biomedical diagnostic and treatment approaches to TCM practice.	✓		
5.3	Integrate TCM and biomedical concepts.			
a	Relate biomedical information concerning patient's condition and treatment to TCM state of health.	✓		
b	Communicate TCM diagnostic and treatment information for use by other health care workers, and to third parties.	✓		

PRACTICE AREA 6 - DIAGNOSTICS & TREATMENT

Occupational Competencies		Common	Acupuncture	Herbology
6.1	Establish priorities for assessment and treatment planning.			
a	Identify chief complaint.	✓		
b	Initiate assessment based upon chief complaint.	✓		
c	Recognize conditions that require urgent medical treatment, and assist or direct patient appropriately.	✓		
d	Modify assessment strategy based upon emerging information.	✓		
e	Initiate collaboration, consultation or referral as appropriate.	✓		
6.2	Assess patient.			
a	Collect information using <i>wang zhen</i> (TCM diagnostic inspection method).	✓		
b	Collect information using <i>wen zhen</i> (TCM diagnostic inquiry method).	✓		
c	Collect information using <i>wen zhen</i> (TCM diagnostic auscultation and olfaction methods).	✓		
d	Collect information using <i>qie zhen</i> (TCM diagnostic palpation method).	✓		
e	Obtain information on biomedical diagnostic data, medical and health history.	✓		
f	Measure vital signs.	✓		
g	Conduct relevant physical examination.	✓		
6.3	Analyze assessment information.			
a	Organize and interpret the collected information using the following TCM syndrome differentiation theories:	✓		
i	<i>ba gang bian zheng</i> (eight principles differentiation)	✓		

PRACTICE AREA 6 - DIAGNOSTICS & TREATMENT

Occupational Competencies		Common	Acupuncture	Herbology
ii	<i>zang-fu bian zheng</i> (organ theory differentiation)	✓		
iii	<i>wu xing bian zheng</i> (five elements differentiation)	✓		
iv	<i>san jiao bian zheng</i> (triple warmer differentiation)	✓		
v	<i>wei qi ying xue bian zheng</i> (four levels differentiation)	✓		
vi	<i>liu jing bian zheng</i> (six stages differentiation)	✓		
vii	<i>qi xue jin ye bian zheng</i> (qi, blood, body fluid differentiation)	✓		
viii	<i>bing yin bian zheng</i> (pathogenic factors differentiation)	✓		
ix	<i>jing luo bian zheng</i> (meridian differentiation)	✓		
b	Incorporate information obtained from biomedical diagnostic data, medical and health history.	✓		
c	Make TCM diagnosis.	✓		
6.4	Establish treatment plan based on diagnosis.			
a	Determine goals of treatment.	✓		
b	Determine treatment principles and strategies.	✓		
d	Take into account precautions and contraindications.	✓		
e	Adapt treatment according to patient characteristics and needs.	✓		
f	Select appropriate points, point combinations and / or treatment areas.		✓	
g	Select appropriate course of acupuncture treatment and therapeutic modalities.		✓	
h	Devise applicable TCM herbal formula.			✓
i	Devise appropriate course of herbal treatment.			✓

PRACTICE AREA 6 - DIAGNOSTICS & TREATMENT

Occupational Competencies		Common	Acupuncture	Herbology
6.5	Provide acupuncture treatment.			
a	Adapt clinical setting to enhance comfort and safety.		✓	
b	Position patient for treatment.		✓	
c	Locate selected points on patient.		✓	
d	Apply treatment techniques.		✓	
e	Monitor and respond to patient condition during treatment.		✓	
6.6	Implement herbal treatment plan.			
a	Instruct patient on accessing TCM herbal formula.			✓
b	Instruct patient on administration of TCM herbal formula.			✓
6.7	Monitor effectiveness of treatment plan and modify where necessary.			
a	Evaluate effectiveness of treatment plan on an ongoing basis.	✓		
b	Modify treatment plan to enhance effectiveness.	✓		
6.8	Educate and counsel patient.			
a	Explain etiology and pathogenesis of condition.	✓		
b	Explain TCM concepts as they apply to patient condition.	✓		
c	Inform patient of possible side effects and reaction to treatment.	✓		
d	Advise patient on <i>yu fang</i> and <i>yang sheng</i> (prevention, diet, exercise, lifestyle).	✓		
e	Counsel patient on compliance with treatment recommendations.	✓		

PRACTICE AREA 7 - ACUPUNCTURE TECHNIQUES

Occupational Competencies		Common	Acupuncture	Herbology
7.1	Perform needling.			
a	Perform filiform needling.		✓	
b	Perform dermal (plum blossom, seven star) needling.		✓	
c	Perform intra-dermal tack needling.		✓	
d	Perform three edge needling.		✓	
7.2	Perform moxibustion.			
a	Perform direct moxibustion.		✓	
b	Perform indirect moxibustion.		✓	
c	Perform needle warming moxibustion.		✓	
7.3	Perform treatment utilizing supplementary devices.			
a	Perform stimulation using heat lamps.		✓	
b	Perform stimulation using electro-acupuncture devices.		✓	
7.4	Perform cupping.		✓	
7.5	Perform <i>tui na</i>.		✓	

PRACTICE AREA 8 – HERBAL DISPENSARY MANAGEMENT

Occupational Competencies		Common	Acupuncture	Herbology
8.1	Maintain herbal inventory.			
a	Identify appropriate supply for herbs.			✓
b	Assess quality of herbs with reference to:			
	i packaging			✓
	ii labeling			✓
	iii physical properties			✓
	iv available quality assurance information			✓
c	Store herbs in appropriate conditions, including:			
	i environment			✓
	ii security			✓
	iii monitoring			✓
d	Maintain records with respect to inventory.			✓
8.2	Prepare and dispense herbal formulas.			
a	Verify formula information is clear, complete and accurate.			✓
b	Verify availability of components and confirm substitution if required.			✓
c	Confirm identity and quality of components.			✓
d	Compound formula.			✓
e	Apply packaging.			✓
f	Apply labeling.			✓
g	Provide instructions for storage and use.			✓
h	Maintain dispensing records.			✓

PRACTICE AREA 9 - SAFETY

Occupational Competencies		Common	Acupuncture	Herbology
9.1	Evaluate patient risk profile.			
a	Determine risk profile relative to acupuncture treatment.		✓	
b	Identify situations where acupuncture is contraindicated.		✓	
c	Determine level of risk relative to TCM herbal treatment.			✓
d	Assess potential for adverse reaction to herbals.			✓
e	Identify situations where herbal treatment plans are contraindicated.			✓
9.2	Provide a safe working environment.			
a	Maintain current knowledge of communicable diseases and infection control techniques.	✓		
b	Apply universal precautions for infection control.	✓		
c	Ensure effective supervision of staff and / or students.	✓		
d	Inspect facilities on a regular basis for electrical hazards, fire risk and physical hazards that may cause accidents, and take action to minimize.	✓		
e	Establish procedures and route for emergency evacuation of facilities.	✓		
f	Establish procedures to maximize protection of self, staff and patients in the event of abusive or violent behaviour.	✓		

PRACTICE AREA 9 - SAFETY

Occupational Competencies		Common	Acupuncture	Herbology
9.3	Manage risks to patients.			
a	Include safety precautions in herbal treatment plan.			✓
b	Apply safety precautions in acupuncture treatment, to enhance accident prevention.		✓	
c	Manage adverse reactions and accidents resulting from treatment.	✓		
d	Respond appropriately to medical emergencies.	✓		
e	Communicate effectively with emergency health service providers.	✓		
f	Provide first aid.	✓		
g	Perform cardiopulmonary resuscitation.	✓		
h	Manage blood-to-blood contact and provide direction for post exposure follow up.		✓	
i	Clean spills of blood and other body fluids.		✓	
j	Control and extinguish small fires.		✓	
9.4	Ensure that equipment is safe and functional.			
a	Select equipment that enhances patient safety.	✓		
b	Maintain equipment in good working order.	✓		
c	Clean and equipment regularly, and disinfect as appropriate.	✓		