



Canadian Alliance of Regulatory Bodies of Traditional
Chinese Medicine Practitioners and Acupuncturists

Request for Proposals for Development of a TCM Education Accreditation Process for CARB - TCMPA

Canadian Alliance of Regulatory Bodies of Traditional Chinese Medicine Practitioners and Acupuncturists

Issue Date: **March 2, 2020**

Proposal Submission Deadline: **April 6, 2020**



Canadian Alliance of Regulatory Bodies of Traditional Chinese Medicine Practitioners and Acupuncturists

1. INTRODUCTION

The Canadian Alliance of Regulatory Bodies of Traditional Chinese Medicine Practitioners and Acupuncturists (CARB-TCMPA) is soliciting proposals from qualified proponents for the development of an education accreditation process for CARB-TCMPA. This Request for Proposal (RFP) contains background information on CARB-TCMPA and the proposal submission requirements.

CARB-TCMPA is the national forum and voice of provincial regulatory authorities that are established by their respective provincial legislation. The founding members comprise the regulatory bodies of Traditional Chinese Medicine Practitioners and Acupuncturists, which include:

- The College of Traditional Chinese Medicine Practitioners and Acupuncturists of British Columbia (CTCMA)
- College and Association of Acupuncturists of Alberta (CAAA)
- The College of Traditional Chinese Medicine Practitioners and Acupuncturists of Ontario (CTCMPAO)
- l'Ordre des acupuncteurs du Québec (OAQ)
- College of Traditional Chinese Medicine Practitioners and Acupuncturists of Newfoundland and Labrador (CTCMPANL)

As provincial regulators, we are known as “Ordre professionnel” in Quebec and “Colleges” in other provinces. The mandate that is entrusted to us by the provincial authorities is one of public protection. For this reason, we govern individuals who practice Traditional Chinese Medicine and Acupuncture and use the titles authorized by provincial legislation to ensure that patients receive safe, quality, and ethical health care services. Through collaborative activities, CARB-TCMPA promotes quality practice and labour mobility across Canada. We serve as a resource to members, governments, and the public. We work collaboratively on identified issues and act on opportunities that could impact the regulation, quality, education, and training of TCM professionals to ensure public protection.

To be eligible for registration with a member of CARB-TCMPA, applicants must have completed an education program specified by requirements of the regulator to which they are applying. However, there is currently no standard process for CARB-TCMPA members to approve school programs. In many cases, CARB-TCMPA members must rely on a case-by-case competency assessment for each applicant. Having a process to review education programs would improve efficiency and further public safety.

2. PROPOSAL SUBMISSION PROCEDURES

2.1 Submission of Proposal

To be eligible for consideration, Proponents must submit one signed Proposal marked “original” by email or one signed original hardcopy to the address provided below. Proposals must be submitted on or before April 6, 2020 at 5:00 p.m. ET. CARB-TCMPA will not consider any Proposals received after the closing time. CARB-TCMPA is also under no obligation to return Proposals.



Canadian Alliance of Regulatory Bodies of Traditional Chinese Medicine Practitioners and Acupuncturists

The Registrar
College of Traditional Chinese Medicine Practitioners and Acupuncturists of Ontario
705-55 Commerce Valley Drive West
Thornhill, Ontario L3T 7V9

Or by email to registrar@ctcmpao.on.ca

2.2 Questions and Enquiries

Proponents, who have read this Request for Proposals (RFP) and are interested in responding may direct questions or request additional information in writing by email to the Registrar at registrar@ctcmpao.on.ca before the deadline for questions on March 20, 2020. All questions and enquiries will be recorded. The questions received and their responses will be disseminated to all Proponents by email prior to the Proposal submission deadline. CARB-TCMPA is not responsible for any misunderstanding on the part of the Proponent and is under no obligation to provide additional information but may do so in its sole discretion.

2.3 CARB-TCMPA's Right to Amend, Supplement, or Cancel RFP

CARB-TCMPA, without liability, cost, or penalty, may at any time cancel, amend, or supplement this RFP. Any material amendments or supplements to this RFP will be communicated in a timely fashion to all Proponents. Any amendments or supplements made by any other party shall not be binding.

2.4 Disqualification of Proposals on Grounds of Faulty Submission

CARB-TCMPA, without liability, cost, or penalty, in its sole discretion, may disqualify any Proposal before the Proposal is fully evaluated if:

- i. It contains incorrect information;
- ii. It does not include all required elements as noted in this RFP;
- iii. The Proponent misrepresents any information provided in its Proposal;
- iv. The Proposal reveals a conflict of interest as per Section 6.3, "Conflict of Interest"; or
- v. The Proposal does not otherwise comply with the terms of the RFP.

2.5 Amending or Withdrawing Proposals Prior to Proposal Submission Deadline

At any time prior to the Proposal submission deadline, a Proponent may amend or withdraw a submitted Proposal. Any amendment must clearly indicate what part of the Proposal the amendment is intended to replace.

A notice of amendment or withdrawal must be signed and sent prior to the Proposal submission deadline to:

The Registrar
College of Traditional Chinese Medicine Practitioners and Acupuncturists of Ontario
705-55 Commerce Valley Drive West
Thornhill, Ontario L3T 7V9

Or by email to registrar@ctcmpao.on.ca



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3. DEFINITIONS

Throughout this RFP, the following definitions apply:

“Contract” means the written agreement resulting from this RFP to be executed by CARB-TCMPA and the Contractor.

“Contractor” means the successful Proponent to this RFP who enters into a written Contract with CARB-TCMPA.

“Must” or “mandatory” means a requirement that must be met in order for a Proposal to receive consideration.

“Proponent” means an individual or a company that submits, or intends to submit, a Proposal in response to this RFP.

“Request for Proposals” or “RFP” means the process described in this document.

“Should” or “desirable” means a requirement having a significant degree of importance to the objectives of the RFP.

4. PROJECT REQUIREMENTS AND DELIVERABLES

4.1 Summary of the Project

CARB-TCMPA is seeking a Consultant to work with the Education Accreditation Working Group, and designated staff representing CARB-TCMPA members, to develop an education accreditation process for traditional Chinese medicine and traditional Chinese medicine acupuncture education programs in Canada.

CARB-TCMPA members are mandated to regulate the profession in the public interest and have the obligation to ensure practitioners are properly trained and qualified to meet the competencies of the profession.

Each CARB-TCMPA member is charged with ensuring new registrants to the profession have met the entry level competencies and possess the knowledge, skills, and judgement necessary to practise safely in the profession. Part of this responsibility is developing appropriate means of assessing an applicant’s qualifications.

This project will consist of developing a process by which CARB-TCMPA can approve traditional Chinese medicine and traditional Chinese acupuncture education programs offered within the jurisdictions of each CARB-TCMPA member. This process must allow CARB-TCMPA members to determine if the education offered meets their requirements for registration.



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CARB-TCMPA is currently seeking a Consultant to carry out this project which requires a process to accredit traditional Chinese medicine and traditional Chinese medicine acupuncture education programs in Canada. This process must allow CARB-TCMPA members to assess the [entry level occupational competencies](#), number of hours a student receives in theoretical and practical instruction, the duration of clinical training and number of patient visits, the education setting (including classroom and clinical settings), and quality of instructors. In addition, the Consultant will be expected to include a process for accrediting online education programs.

The Consultant must conduct an environmental scan to seek best practices in accrediting traditional Chinese medicine and traditional Chinese medicine acupuncture education programs in other jurisdictions and education programs of other health professions, develop a process for accrediting education programs, and provide assessment tools to be used by assessors reviewing education programs.

4.2 Project Requirement

The successful Proponent will meet with the Education Accreditation Working Group and develop timelines and methodology to carry out the education accreditation project. They will prepare reports and recommendations to the Education Accreditation Working Group based on feedback and findings.

4.3 Project Deliverables

The Proponent is expected to deliver the following:

4.3.1 Detailed Project Work Plan with Proposed Timelines for the Duration of the Contract

The project work plan should describe:

- The plan and timeline of how the project will be executed;
- A plan to facilitate a consultation process with Acupuncturists and Traditional Chinese Medicine Practitioners registered with CARB-TCMPA members, other regulatory bodies, educational institutes, and stakeholders who have varied levels of education and experience;
- A process to review the education accreditation requirements in other jurisdictions and other health regulatory colleges;
- The activities necessary for creating an education accreditation process; and
- The efforts that will be made to ensure transparency, fairness, and validity of the process.

4.3.2 Hold Consultations with Stakeholders

The Consultant will develop a methodology and facilitate consultation with:

- Acupuncturists and Traditional Chinese Medicine Practitioners registered with CARB-TCMPA members;
- Other jurisdictions that regulate TCM/Acupuncture;
- Canadian TCM education facilities;
- TCM associations in Canada;



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- Ontario Office of the Fairness Commissioner and its Canadian counterparts;
- Ministries of Health;
- Ministries responsible for training, colleges, and universities; and
- Regulatory bodies for other health professions in Canada.

4.3.3 Develop Education Accreditation Process

The Consultant will develop a process that includes the following:

- A method for schools to apply for education accreditation and to submit education documents;
- A method to review the program hours for theoretical and practical instruction;
- A method to review the content of the program against the entry level competencies (Appendix A) and performance indicators of the profession (performance indicators can be made available to proponents), and program-level learning outcomes;
- A method to review the program of clinical experience based on weeks of clinic experience and the number of patient visits including direct patient contact;
- A method to assess education settings including classrooms and clinic environments;
- Minimum required experience and qualifications for program instructors and clinic supervisors; and
- Review tools for assessors to use when assessing the above requirements.

4.3.4 Online and Distance Learning

The Consultant will conduct research on best practices for online and distance education programs and provide recommendations to the Education Accreditation Working Group on:

- Maximum percentage of the program that may be completed online, if at all;
- TCM entry level competencies that are not suitable for online education; and
- Acceptable delivery method for online education (e.g. Real-time online lectures, recorded lectures, etc.).

4.3.5 Prepare Reports and Recommendations

The Consultant will prepare reports and recommendations based on the findings that will demonstrate:

- Value to the public;
- Feedback from various stakeholders;
- Required documentation from schools seeking education accreditation;
- Methods for assessing education (refer to 4.4.3); and
- Assessment tools.

4.3.6 Reporting and Approval Requirements

Reports prepared by the Proponent are to be submitted to:

The Registrar
College of Traditional Chinese Medicine Practitioners and Acupuncturists of Ontario
705-55 Commerce Valley Drive West
Thornhill, ON L3T 7V9



Canadian Alliance of Regulatory Bodies of Traditional Chinese Medicine Practitioners and Acupuncturists

Or by email to registrar@ctcmpao.on.ca

The Registrar of the College of Traditional Chinese Medicine Practitioners and Acupuncturists of Ontario, or the designated staff, will distribute reports and communications from the Proponent to the Education Accreditation Working Group for consideration and approval.

4.4 Project Timelines

The 12-month project is expected to be completed in the period of May 2020 to April 2021, however, the start date may be adjusted based on the procurement timelines.

5. GENERAL REQUIREMENTS

This Section describes the elements that CARB-TCMPA will require the successful Proponent to provide. The Proponent should address each element listed below indicating how it will meet CARB-TCMPA's needs.

5.1 General Requirements

The Proponent should demonstrate an understanding of the project to be undertaken and services to be provided and should describe the approaches the Proponent will take to meet CARB-TCMPA's requirements.

The scope and deliverables of this project are outlined in Section 4, "Project Requirements and Deliverables."

5.2 Qualification/Personnel Requirements

The Proponent should include a detailed description of the relevant qualifications, skills, and experience of the project team that will be assigned to provide the services. A resume or CV of the project lead(s) and company profile should be included in the proposal.

5.3 Proposed Work-Plan and Timeframe for Project Completion/Service Delivery

The Proponent should provide a detailed work plan of the project and services it will provide including an overview of tasks, milestones and timeframes. This can be accomplished using a chart, graphic or other tool.

The timeframe for this project is expected to adhere to the requirements noted in Section 4.5, "Project Timelines."

5.4 Cost Estimates/Budgets

The Proponent should:

- i. provide his/her consulting fees on a per diem rate at seven and a quarter hours per calendar day;
- ii. set out separately all anticipated expenses, including travel expenses; and
- iii. calculate the total cost of the project/services to be provided.



6. FORMAT OF THE PROPOSAL

6.1 Proposal Format Checklist

The Proposal should include:

- i. one signed Proposal marked “original” by email or one signed original hardcopy to arrive at the office on or before April 6, 2020 at 5:00 p.m. ET;
- ii. all required elements as described in the RFP;
- iii. a description of the Proponent’s ability to satisfy the requirements of the RFP; and
- iv. a detailed cost for the proposed services.

6.2 Proponent Information

The Proposal should include:

- i. Contact person(s) name, email address, and telephone number;
- ii. Proponent’s legal name and any other name under which it carries on business; and
- iii. Proponent’s address, telephone and facsimile numbers.

6.3 Conflict of Interest

For conflict of interest reasons, CARB-TCMPA will not accept proposals from Proponents who are affiliated with education institutions that offer TCM or TCM acupuncture education programs.

The Proponent must confirm in its Proposal that the Proponent:

- i. does not and will not have any conflict of interest (actual or perceived) in submitting its Proposal or, if selected, with the contractual obligations as Contractor under the Agreement. Where applicable, a Proponent must declare in its Proposal any situation that may be a conflict of interest in submitting its Proposal.

The Proponent must confirm that the Proponent neither has nor has had access to any Conflict of Interest Confidential Information as defined below:

- ii. “Conflict of Interest Confidential Information” refers to confidential information of CARB-TCMPA other than confidential information disclosed to Proponent in the normal course of the RFP. The Conflict of Interest Confidential Information is relevant to the project and services required by the RFP and the RFP evaluation process, and the disclosure for which could result in prejudice to CARB-TCMPA or an unfair advantage to the Proponent.
- iii. “Confidential Information” means information, data, material, and items in any form supplied to the Proponent by CARB-TCMPA or otherwise acquired by the Proponent in connection with this RFP, whether supplied to or acquired by the Proponent before or after the issuance of this RFP, as well as all software and deliverables supplied or created by the Proponent.

All Confidential Information is the property of CARB-TCMPA, unless otherwise indicated.



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The Proponent shall ensure that it:

- i. holds Confidential Information in confidence;
- ii. does not disclose Confidential Information without prior written authorization from CARB-TCMPA;
- iii. upon request returns Confidential Information to CARB-TCMPA within ten calendar days after any request; and
- iv. upon request returns and/or securely destroys all Confidential Information to CARB-TCMPA within ten calendar days after the announcement of the qualified Proponent.

The Proposal of any Proponent may be disqualified, or if the Proposal is accepted, can be cancelled, where the Proponent fails to provide confirmation of the foregoing or makes misrepresentations regarding any of the above.

7. EVALUATION PROCESS

The objective of the evaluation process is to identify the Proposal(s) that most effectively meet(s) the requirements of the RFP based on the evaluation criteria.

7.1 Evaluation Process

CARB-TCMPA shall evaluate all Proposals that have not been disqualified for the reasons set out in Section 2.4, "Disqualification of Proposals."

7.2 Evaluation of Overall Presentation of Proposal and General Requirements of the RFP

Stage 1:

CARB-TCMPA shall evaluate the Proponent's Proposal based on the rated criteria with respect to the requirements of the RFP provided for in Section 4, "Project Requirements and Deliverables."

Stage 2:

The top Proponents will be invited to participate in an interview/presentation with the Education Accreditation Working Group.

Stage 3:

CARB-TCMPA will ask for and check the references provided by the selected Proponents.

Further details concerning this evaluation are provided for in Section 9, "Evaluation Criteria."

CARB-TCMPA reserves the right to communicate with Proponents as necessary during the evaluation process. Not all Proponents may be communicated with in the same manner or to the same extent.



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CARB-TCMPA without liability, cost, or penalty, may, in its sole discretion, at any stage, do one or more of the following:

- i. qualify any Proponent;
- ii. not qualify any Proponent;
- iii. cancel the RFP;
- iv. issue a new RFP; or
- v. short-list one or more Proponents for further evaluation.

8. CONTRACT

Subject to satisfactory reference checks, the selected Proponent will be required to enter into an acceptable written contract with CARB-TCMPA before final selection. CARB-TCMPA may, in its sole discretion, enter into preliminary discussions with the Proponent with the aim of expediting the finalization of the contract and any negotiations.

9. EVALUATION CRITERIA

Each Proponent’s submitted Proposal will be evaluated based on the following criteria:

Stage 1

Rated Criteria	Weighting (Points)
Experience and Qualifications <ul style="list-style-type: none"> • Proven track record • Proven experience and understanding of Registration Regulations 	40 points
Process Development <ul style="list-style-type: none"> • Proven experience in methodology and facilitation of consultations • Proven experience in developing similar processes • Proven experience in report and recommendations preparation 	60 points
Accountability <ul style="list-style-type: none"> • Proven ability to meet timeline and delivery expectations 	20 points
Total out of a possible 120 points	

Stage 2

Rated Criteria	Weighting (Points)
Interview/Presentation <ul style="list-style-type: none"> • Unique experience in execution of similar projects • Unique aspects to ensure timely delivery of project deliverables 	40 points
Total out of a possible 40 points	



Stage 3

Rated Criteria	Weighing (Points)
References <ul style="list-style-type: none"> • Responsiveness to client needs and flexibility • Reliability and professionalism 	40 points
Total out of a possible 40 points	

The questions below have been provided to indicate the kinds of considerations CARB-TCMPA will make when evaluating Proposals. This list may not be exhaustive. The questions have been organized to correspond to the requirements provided for in Section 4, “Project Requirements and Deliverables” and Section 5, “General Requirements.”

9.1 Evaluation of the General Requirements

Does the Proponent describe the project and their services in such a way that the Proponent demonstrates an understanding of the project?

9.2 Evaluation of Qualifications

Do the qualifications, skills, and experience of the Proponent appear to be appropriate and sufficient to meet CARB-TCMPA’s needs?

9.3 Evaluation of Proposed Work Plan and Timeframe for Project Completion/Service Delivery

Does the work plan and timeframe address and meet CARB-TCMPA’s needs?

9.4 Evaluation of Cost Estimates/Budgets

How does the total cost of the project compare with the costs shown in other Proposals? Does it fit within CARB-TCMPA’s budgetary allocation for this project? Cost is not the only consideration and the lowest bid may not necessarily be the successful one.

9.5 Evaluation of Communications Abilities

Has the Proponent communicated clearly? How will the Proponent be able to accommodate the unique language challenges of the project and its stakeholders?

APPENDIX A

**Canadian Alliance of Regulatory Bodies for Traditional Chinese Medicine
Practitioners and Acupuncturists (CARB-TCMPA)**

**Pan-Canadian Standard for
Traditional Chinese Medicine Practitioners and Acupuncturists:**

**Entry-Level Occupational Competency Profile
2018**

(rev 3, May 2 2019)

Approved by the provincial regulatory authorities

INTRODUCTION

Occupational Competencies were first developed by the Canadian Alliance of Regulatory Bodies for Traditional Chinese Medicine Practitioners and Acupuncturists (CARB-TCMPA) in 2009, and updated in 2010 and 2015. They underwent a comprehensive review and revalidation in 2017, leading to the current document.

The original 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 consultant¹. The committee utilized source documents from various countries describing TCM education and practice, as well as the expertise of its members.

Validation surveys took place in 2009 and 2017. This involved online consultation of practitioners in British Columbia, Alberta, Ontario, Quebec 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-to-practice requirements.

An Occupational Competency is defined as the ability to perform a job function with a specified level of proficiency.

At entry-to-practice, the minimum level of proficiency required is *Entry-Level Proficiency*, which is characterized as follows:

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 patient.

¹ Catalysis Consulting, www.catalysisconsulting.net

INTRODUCTION

The 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 Therapy and Management
9. Safety

Within each area, the competencies are identified as

Common: applicable to both acupuncture and herbology (herbal therapy)

Acupuncture: unique to the practice of acupuncture

Herbology: unique to the practice of herbology (herbal therapy)

PRACTICE AREA 1 - INTERPERSONAL SKILLS

Occupational Competencies		Common	Acupuncture	Herbology
1.1	Utilize professional communication.			
a	Speak effectively, using appropriate terminology.	✓		
b	Write effectively, using appropriate terminology.	✓		
c	Comprehend written information.	✓		
d	Comprehend information presented orally.	✓		
e	Ensure effectiveness of communication.	✓		
f	Communicate with professional integrity.	✓		
g	Respond to non-verbal communication.	✓		
h	Respond to sources of interpersonal conflict.	✓		
i	Adapt communication style in response to needs of recipient.	✓		
1.2	Develop and maintain effective inter-professional relationships.			
a	Work cooperatively in an interdisciplinary health care setting.	✓		
b	Develop productive working relationships.	✓		
c	Recognize the variety of health and social services commonly available and direct patients appropriately.	✓		
1.3	Develop and maintain effective relationships with patients.			
a	Show respect toward patients as individuals.	✓		
b	Exhibit compassion toward patients.	✓		
c	Maintain practitioner / patient boundaries.	✓		
d	Facilitate honest, reciprocal communication.	✓		
e	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 ongoing, informed consent.	✓		
c	Respect patient rights to privacy and confidentiality.	✓		
d	Terminate course of treatment when appropriate.	✓		
2.3	Maintain practitioner self-care.			
a	Maintain personal health and wellness in the context of professional practice.	✓		
b	Exhibit professional deportment.	✓		
2.4	Practice with professional integrity.			
a	Practice within limits of expertise.	✓		
b	Modify practice to enhance effectiveness.	✓		
c	Exhibit professional behaviour.	✓		
d	Engage with colleagues in professional activities related to the practice of TCM.	✓		
e	Critically assess personal performance and set goals for improvement.	✓		
f	Undertake professional development activities aimed at enhancing practice.	✓		
g	Remain current with developments in acupuncture practice.		✓	
h	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 records.	✓		
b	Ensure security and integrity of records.	✓		
3.2	Utilize effective business strategies.			
a	Ensure sound financial management.	✓		
b	Employ ethical business practices.	✓		
c	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 (qi, blood, body fluid, essence, spirit)	✓		
f		ti zhi (constitution)	✓		
g		bing yin (etiology)	✓		
h		bing ji (pathogenesis)	✓		
i		yu fang (prevention)	✓		
j		zhi ze (principles of treatment)	✓		
k		yang sheng (health preservation)	✓		
4.2		Display knowledge of the origin and value of the TCM Classics.	✓		
4.3		Apply fundamentals of acupuncture in diagnosis and treatment.			
a		Characterize the following points.			
	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 (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 transport 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 crossing points)		✓	
xii	<i>a shi xue</i> (ah shi points)		✓	
xiii	ear and scalp acupuncture		✓	
c	Select points for assessment.		✓	
d	Select points or areas for therapy.		✓	
e	Select stimulation techniques.		✓	
f	Apply knowledge of precautions and contraindications for application of stimulation techniques.		✓	
g	Apply knowledge of adjunct techniques:			
i	<i>tui na / an mo</i> (acupressure)		✓	
ii	<i>qi gong / tai ji</i>		✓	
iii	<i>gua sha</i>		✓	
4.4	Apply knowledge of the following properties and functions of TCM herbs in treatment planning:			
a	<i>si qi</i> (four properties)			✓
b	<i>wu wei</i> (five flavours)			✓
c	<i>sheng jiang fu chen</i> (ascending, descending, floating, sinking)			✓
d	<i>gui jing</i> (channel tropism)			✓
e	actions			✓

PRACTICE AREA 4 – TRADITIONAL CHINESE MEDICINE FOUNDATIONS

Occupational Competencies			Common	Acupuncture	Herbology
f		indications			✓
g		toxicity			✓
h		<i>pao zhi</i> (processing)			✓
4.5		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			✓
4.6		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.			
a	human anatomical structures	✓		
b	biochemical processes	✓		
c	control mechanisms	✓		
d	infectious diseases and infection control	✓		
e	dysfunctions and common diseases	✓		
5.2	Relate biomedical diagnostic and treatment approaches to TCM practice.			
a	diagnosis and treatment methods	✓		
b	pharmacology	✓		
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 direct patient appropriately.	✓		
d	Modify assessment strategy based upon emerging information.	✓		
e	Initiate collaboration, consultation or referral as appropriate.	✓		
f	Recognize support needs beyond the scope of TCM, and advise patient accordingly.	✓		
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	Measure vital signs.	✓		
f	Conduct relevant non-invasive physical examination.	✓		
6.3	Analyze assessment information.			
a	Organize and interpret the collected information using the following TCM syndrome differentiation methods:	✓		
i	<i>ba gang bian zheng</i> (eight principles differentiation)	✓		
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)	✓		

PRACTICE AREA 6 - DIAGNOSTICS & TREATMENT

Occupational Competencies		Common	Acupuncture	Herbology
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 TCM treatment goals and strategies.	✓		
b	Take into account precautions and contraindications.	✓		
c	Adapt treatment according to patient characteristics and needs.	✓		
d	Select appropriate points, point combinations and / or treatment areas.		✓	
e	Select appropriate course of acupuncture treatment and therapeutic modalities.		✓	
f	Devise applicable TCM herbal formula.			✓
g	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 and health preservation).	✓		
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 edged 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 THERAPY AND 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 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	Determine level of risk relative to TCM herbal treatment.			✓
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 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.	✓		
9.3	Manage risks to patients.			
a	Include safety precautions in herbal treatment plan.			✓
b	Manage adverse reactions and accidents resulting from treatment.	✓		
c	Respond appropriately to medical emergencies.	✓		
d	Manage blood-to-blood contact and provide direction for post exposure follow up.		✓	
e	Clean spills of blood and other body fluids.		✓	
f	Control and extinguish small fires.		✓	

PRACTICE AREA 9 - SAFETY

Occupational Competencies		Common	Acupuncture	Herbology
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 equipment regularly, and disinfect as appropriate.	✓		