

**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**

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**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 consultant<sup>1</sup>. 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.*

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<sup>1</sup> Catalysis Consulting, [www.catalysisconsulting.net](http://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
<b>1.1</b>	<b>Utilize professional communication.</b>			
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.	✓		
<b>1.2</b>	<b>Develop and maintain effective inter-professional relationships.</b>			
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.	✓		
<b>1.3</b>	<b>Develop and maintain effective relationships with patients.</b>			
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
<b>2.1</b>	<b>Comply with legal requirements.</b>			
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.	✓		
<b>2.2</b>	<b>Practice in a manner that accords patient dignity and reflects patient rights.</b>			
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.	✓		
<b>2.3</b>	<b>Maintain practitioner self-care.</b>			
a	Maintain personal health and wellness in the context of professional practice.	✓		
b	Exhibit professional deportment.	✓		
<b>2.4</b>	<b>Practice with professional integrity.</b>			
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**

<b>Occupational Competencies</b>		<b>Common</b>	<b>Acupuncture</b>	<b>Herbology</b>
<b>3.1</b>	<b>Maintain patient records.</b>			
a	Ensure complete and accurate records.	✓		
b	Ensure security and integrity of records.	✓		
<b>3.2</b>	<b>Utilize effective business strategies.</b>			
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
<b>4.1</b>		<b>Apply fundamental knowledge of the following Traditional Chinese Medicine principles in diagnosis and treatment:</b>			
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)	✓		
<b>4.2</b>		<b>Display knowledge of the origin and value of the TCM Classics.</b>	✓		
<b>4.3</b>		<b>Apply fundamentals of acupuncture in diagnosis and treatment.</b>			
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>		✓	
<b>4.4</b>	<b>Apply knowledge of the following properties and functions of TCM herbs in treatment planning:</b>			
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)			✓
<b>4.5</b>		<b>Apply knowledge of herbal formulating strategies, with reference to:</b>			
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			✓
<b>4.6</b>		<b>Apply knowledge of the following herb interactions in treatment planning:</b>			
a		herb – drug interactions			✓
b		herb – herb interactions			✓
c		herb – food interactions			✓
d		herb – natural health product interactions			✓

**PRACTICE AREA 5 - FUNDAMENTALS OF BIOMEDICINE**

<b>Occupational Competencies</b>		<b>Common</b>	<b>Acupuncture</b>	<b>Herbology</b>
<b>5.1</b>	<b>Apply basic biomedical concepts to TCM practice.</b>			
a	human anatomical structures	✓		
b	biochemical processes	✓		
c	control mechanisms	✓		
d	infectious diseases and infection control	✓		
e	dysfunctions and common diseases	✓		
<b>5.2</b>	<b>Relate biomedical diagnostic and treatment approaches to TCM practice.</b>			
a	diagnosis and treatment methods	✓		
b	pharmacology	✓		
<b>5.3</b>	<b>Integrate TCM and biomedical concepts.</b>			
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
<b>6.1</b>	<b>Establish priorities for assessment and treatment planning.</b>			
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.	✓		
<b>6.2</b>	<b>Assess patient.</b>			
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.	✓		
<b>6.3</b>	<b>Analyze assessment information.</b>			
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.	✓		
<b>6.4</b>	<b>Establish treatment plan based on diagnosis.</b>			
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
<b>6.5</b>	<b>Provide acupuncture treatment.</b>			
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.		✓	
<b>6.6</b>	<b>Implement herbal treatment plan.</b>			
a	Instruct patient on accessing TCM herbal formula.			✓
b	Instruct patient on administration of TCM herbal formula.			✓
<b>6.7</b>	<b>Monitor effectiveness of treatment plan and modify where necessary.</b>			
a	Evaluate effectiveness of treatment plan on an ongoing basis.	✓		
b	Modify treatment plan to enhance effectiveness.	✓		
<b>6.8</b>	<b>Educate and counsel patient.</b>			
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
<b>7.1</b>	<b>Perform needling.</b>			
a	Perform filiform needling.		✓	
b	Perform dermal (plum blossom, seven star) needling.		✓	
c	Perform intra-dermal tack needling.		✓	
d	Perform three edged needling.		✓	
<b>7.2</b>	<b>Perform moxibustion.</b>			
a	Perform direct moxibustion.		✓	
b	Perform indirect moxibustion.		✓	
c	Perform needle warming moxibustion.		✓	
<b>7.3</b>	<b>Perform treatment utilizing supplementary devices.</b>			
a	Perform stimulation using heat lamps.		✓	
b	Perform stimulation using electro-acupuncture devices.		✓	
<b>7.4</b>	<b>Perform cupping.</b>		✓	
<b>7.5</b>	<b>Perform <i>tui na</i>.</b>		✓	

## PRACTICE AREA 8 – HERBAL THERAPY AND MANAGEMENT

Occupational Competencies		Common	Acupuncture	Herbology
<b>8.1</b>	<b>Maintain herbal inventory.</b>			
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.			✓
<b>8.2</b>	<b>Prepare and dispense herbal formulas.</b>			
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**

<b>Occupational Competencies</b>		<b>Common</b>	<b>Acupuncture</b>	<b>Herbology</b>
<b>9.1</b>	<b>Evaluate patient risk profile.</b>			
a	Determine risk profile relative to acupuncture treatment.		✓	
b	Determine level of risk relative to TCM herbal treatment.			✓
<b>9.2</b>	<b>Provide a safe working environment.</b>			
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.	✓		
<b>9.3</b>	<b>Manage risks to patients.</b>			
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**

<b>Occupational Competencies</b>		<b>Common</b>	<b>Acupuncture</b>	<b>Herbology</b>
<b>9.4</b>	<b>Ensure that equipment is safe and functional.</b>			
a	Select equipment that enhances patient safety.	✓		
b	Maintain equipment in good working order.	✓		
c	Clean equipment regularly, and disinfect as appropriate.	✓		