

The following is a product of the Consortium of Academic Health Centers for Integrative Medicine.

## **Integrative Medicine Clinical Fellowship Core Competencies**

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### **Integrative Medicine Clinical Fellowship Competencies Task Force**

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## Introduction

Integrative Medicine is the practice of medicine that reaffirms the importance of the relationship between practitioner and patient, focuses on the whole person, is informed by evidence, and makes use of all appropriate therapeutic approaches, healthcare professionals and disciplines to achieve optimal health and healing. (*Developed and Adopted by The Consortium of Academic Health Centers for Integrative Medicine, 2009*)

There are currently 13 established fellowships in the United States for clinical integrative medicine training. These fellowships are diverse in terms of the number of years required, the educational content, and expectations. As advanced training expands and board certification becomes available, it is important to have established core competencies to guide fellowship directors in curriculum development.

A task force from the Consortium of Academic Health Centers for Integrative Medicine (CAHCIM) developed these recommended competencies for integrative medicine clinical fellowship. CAHCIM is a group constituted by 54 academic health centers and healthcare systems devoted to the advancement of the principles and practices of integrative healthcare within academic institutions. The Consortium provides its institutional membership with a community of support for its academic missions and a collective voice for influencing change. Its mission is accomplished through: supporting and mentoring academic leaders, faculty, and students to advance integrative healthcare curricula, research, and clinical care; disseminating information on rigorous scientific research, educational curricula in integrative health, and sustainable models of clinical care; and informing health care policy. The charter of the fellowship task force was to provide leadership within CAHCIM for consensus on a minimum set of competencies that a graduate from a clinical integrative medicine fellowship should demonstrate.

Evidence is emerging to support lifestyle interventions such as nutrition, physical activity and stress management for disease prevention and management, with demonstration of cost-effectiveness, improved quality of life and reduced reliance on medications. Medical school and residency include curricula in these core areas to varying degrees, with many studies reporting that graduates lack confidence in their ability to educate patients effectively in these arenas. These lifestyle approaches are strongly emphasized in integrative medicine training and clinical care. Integrative medicine is also a vehicle for acquiring, assessing and disseminating the growing data on efficacy, both positive and negative, for complementary and alternative modalities such as acupuncture, massage, and dietary supplements. Integrative medicine clinicians can play a key role in communicating this knowledge to patients and professional colleagues.

# 1. PATIENT CARE

*The integrative medicine fellow should demonstrate compassionate, appropriate, and effective patient care based on the existing evidence base in integrative medicine for disease prevention, treatment of illness and health promotion.*

## 1.1 Perform an in-depth integrative medicine assessment.

### 1.1.1 Demonstrate advanced skill in collecting essential components of an integrative medicine assessment including but not limited to:

- Identifying patients' health concerns, goals, and expectations.
- A thorough conventional medical history and physical exam.
- Current and past complementary and alternative medicine (CAM) therapy use, including patient experience and response.
- Current and past dietary supplement intake.
- Nutrition, physical activity, sleep pattern.
- Stressors and stress management skills.
- Personal relationships, social network, support systems.
- Religious and spiritual history.

### 1.1.2. Develop an appropriate differential diagnosis and performs a diagnostic evaluation based on available guidelines and evidence for conventional and integrative testing.

## 1.2. Demonstrate advanced skills in developing integrative medicine treatment plans based on patient values and preferences, up-to-date scientific evidence, and clinical judgment.

Treatment plans should:

### 1.2.1. Integrate conventional medicine, evidence-based complementary therapies, and lifestyle modification, as appropriate.

### 1.2.2. Address patient concerns in one or more domains (e.g., physical, psychological, social, spiritual).

## 1.3. Counsel patients on the risks, benefits, and alternatives to an integrative medicine treatment plan, including a discussion of existing evidence to facilitate informed decision making on integrative approaches to care.

## 1.4. Demonstrate advanced skills in assessment and treatment of patients with complex conditions, including symptoms or diseases with unexplained or poorly understood etiologies.

## 1.5. Perform competently all medical procedures or complementary medicine therapies appropriate for the fellow's area of practice. \*

- 1.6. Provide health care services aimed at preventing illness and promoting health and wellness.
  - 1.6.1. Collaborate with patients to plan and perform evidence-based health screenings for disease prevention using relevant conventional and integrative approaches.<sup>#</sup>
  - 1.6.2. Counsel patients on the evidence for integrative therapies for optimizing health and wellness.
  - 1.6.3. Educate patients on the role of lifestyle factors for optimizing health and wellness. Give adequate consideration to sleep, diet, exercise, stress, habits, relationships, community, and spirituality as potential factors influencing health.
  - 1.6.4. Demonstrate expertise in facilitating behavioral changes in patients using evidence-based strategies.<sup>##</sup>

**Footnotes:**

- \* Includes medical interventions or complementary practices such as acupuncture, relaxation training and manipulation. Approaches utilized may be specific to fellow's subspecialty.
- # Examples include personalized approaches to preventive care based on personal and family history, such as preventive cardiovascular testing.
- ## Examples of behavior change theories and techniques include motivational interviewing and the stages of change model.

## 2. MEDICAL KNOWLEDGE

*The Integrative Medicine fellow should demonstrate advanced knowledge of established and evolving biomedical, clinical, epidemiological and social-behavioral sciences relevant to Integrative Medicine.*

### 2.1. Describe the scope and practice of integrative medicine including:

- Domains of complementary and alternative medicine (CAM) as defined by the National Center for Complementary and Alternative Medicine (NCCAM) of the National Institutes of Health.
- Evolving role of CAM in co-management of patients.
- History of integrative medicine.
- Settings in which integrative medicine care is provided.
- Demographic and epidemiologic patterns of integrative medicine use.
- Status of commercial and government insurance coverage for integrative services.
- Legal and ethical issues relevant to the practice of integrative medicine.
- Barriers to access of integrative medicine services.

### 2.2. Demonstrate expert knowledge of the established and evolving evidence-base for how lifestyle factors influence health and illness including:

- 2.2.1. The impact of emotional and physical stress on biologic markers and disease processes.
- 2.2.2. Advanced nutrition theory and practice, such as the role of intensive diet change in the treatment of chronic disease, the impact of medications on micronutrient levels, the role of specific diets for varied diseases, and the safety and evidence for “fad” diets.
- 2.2.3. Science of physical activity recommendations and required components of individualized exercise prescriptions.
- 2.2.4. Knowledge of sleep disorders and impairment from sleep deprivation, including their impact on co-morbidities and well-being.
- 2.2.5. Role of social connections and spiritual beliefs to health and illness.

### 2.3. Describe the established and evolving evidence-base for common CAM and traditional medical systems, including current information on effectiveness, safety, indications, contraindications, mechanisms, and interactions.

### 2.4. Describe the established and evolving evidence-base for dietary supplements in the management of common medical conditions.

- 2.4.1. List common uses, potential adverse effects, drug-supplement interactions, clinical pharmacology, and dosing for frequently encountered dietary supplements.
- 2.4.2. Demonstrate advanced knowledge of the evidence for efficacy and safety of commonly used dietary supplements.

- 2.4.3. Identify credible evidence-based resources for information on dietary supplements.
- 2.4.4. Explain historic and current regulations governing dietary supplements in the U.S.
- 2.4.5. Understand the influence of dietary supplement regulations on dietary supplement clinical efficacy, safety, and quality.
- 2.5. Describe the history, philosophy and theory for common CAM therapies and traditional medical systems.
- 2.6. Demonstrate advanced knowledge of the evidence-based integrative medicine model as applied to a range of common clinical conditions.
- 2.7. Demonstrate advanced knowledge of principles central to integrative medicine practice including, but not limited to:
  - Evidence-based medicine.
  - Medical pluralism.
  - Preventive medicine.
  - Patient centered care.
  - Therapeutic alliance.
  - Biopsychosocial model and holism.
  - Placebo effect.
  - Cultural competence.
  - Physician self-care.
  - Behavioral change.
  - Biochemical individuality.
  - Patient self-care to enhance resiliency.



### **3. PRACTICE BASED LEARNING AND IMPROVEMENT**

*The integrative medicine fellow should be able to investigate and evaluate their care of patients, to appraise and assimilate scientific evidence, and to continuously improve patient care based on constant self-evaluation and life-long learning.*

**3.1. Maintain a safe and competent practice, including self-evaluation and continuous learning.**

- 3.1.1. Demonstrate the ability to self-reflect on deficiencies and limits in integrative medicine knowledge and skills.
- 3.1.2. Develop an independent learning plan for improvement.
- 3.1.3. Demonstrate knowledge of and commitment to continuing professional development and life-long learning in integrative medicine.
- 3.1.4. Demonstrate the ability to reflect on his/her personal learning style and use different opportunities for learning.
- 3.1.5. Demonstrate the ability to actively seek and utilize feedback from faculty and other professionals to improve integrative medicine patient care skills.

**3.2. Demonstrate common approaches to quality and safety assurance.**

- 3.2.1. Assess the quality of integrative patient care provided to his/her patients by using standardized measurements such as clinical and patient-reported outcomes.
- 3.2.2. Design and conduct appropriate practice-based improvement activities to improve integrative care quality and safety.
- 3.2.3. Design and implement health information technology strategies to enhance the quality of integrative health care for patients.

**3.3. Access, analyze, and apply the evidence base to clinical practice in integrative medicine.**

- 3.3.1. Demonstrate knowledge of evidence-based medicine and other emerging scientific methodologies in integrative care.
- 3.3.2. Actively seek to apply the best available evidence on safety, efficacy, and cost-effectiveness to facilitate safe, up-to-date integrative care.

**3.4. Develop competencies as an educator.**

- 3.4.1. Demonstrate knowledge of the roles and responsibilities of a trainee and mentor.
- 3.4.2. Recognize the importance of assessing learning needs and learner attitudes and beliefs in initiating a teaching encounter.
- 3.4.3. Participate in integrative medicine education for clinical trainees and other health professionals at local, regional, and/or national levels.
- 3.4.4. Demonstrate skill in educating patients and lay public on integrative medicine theory and practice.

- 3.5. Develop expertise in an evidence-based integrative modality that meets a significant need in his/her patient panel.
  - 3.5.1. Meet requirements for licensure (if extant).
  - 3.5.2. Provide the modality as part of his/her overall scope of practice.
- 3.6. Demonstrate knowledge of the process and opportunities for research in integrative medicine.
  - 3.6.1. Recognize the challenges unique to integrative medicine research.
  - 3.6.2. Recognize the importance of data to demonstrate clinical, utilization and financial outcomes of integrative approaches.

## 4. INTERPERSONAL AND COMMUNICATION SKILLS

*The integrative medicine fellow should be able to demonstrate interpersonal and communication skills that result in effective relationship building, information exchange, emotional support, shared decision-making and teaming with patients, families, and colleagues.*

- 4.1. Effectively communicate about integrative medicine with patients, families, and the public, as appropriate, across a broad range of socioeconomic and cultural backgrounds.
  - 4.1.1. Use appropriate concepts and language when communicating with patients and families, taking into consideration factors such as age, socioeconomic status, spiritual and cultural beliefs, and health literacy.
  - 4.1.2. Demonstrate respect and understanding for patients' cultural beliefs and practices related to health and illness.
- 4.2. Demonstrate empathy to form therapeutic alliances with patients and families.
  - 4.2.1. Use empathic and facilitating verbal behaviors such as naming, affirmation, normalization, reflection, silence, listening, self-disclosure and humor in an appropriate and effective manner.
  - 4.2.2. Employ empathic and facilitating non-verbal behaviors such as eye contact, open posture, eye-level approach and touch in an appropriate and effective manner.
- 4.3. Elicit patient goals, concerns and values related to their health care using a patient-centered approach to inquiry and listening.
- 4.4. Effectively use interpersonal and communication skills in the following clinical situations:
  - Communicating the range of integrative treatment options to manage complex problems.
  - Explaining the philosophical underpinnings, benefits, risks, and options of various CAM modalities.
  - Counseling patients on the state of evidence for controversial topics in integrative medicine.\*
  - Counseling patients who refuse recommended conventional medical interventions.
- 4.5. Create informative and effective patient education and self-care instruction materials, appropriate for the patient's level of health literacy.
- 4.6. Employ effective strategies to help patients make lifestyle changes.
  - 4.6.1. Use effective communication strategies for facilitating behavior change.

- 4.6.2. Model healthy behavior and lifestyle choices.
- 4.7. Demonstrate self-awareness of one's own role in patient-provider interactions.
  - 4.7.1. Recognize the influence of one's own personal beliefs, values, and culture on patient-provider communication.
  - 4.7.2. Reflect on one's own emotional, mental and physical state in clinical settings to better focus on meeting the needs of the patient.
- 4.8. Communicate effectively with physicians, other health professionals, and health related agencies.
  - 4.8.1. Communicate and interact respectfully with colleagues, staff, consultants and CAM practitioners who share in the care of patients.
  - 4.8.2. Effectively communicate integrative medicine skills and expertise to others.
- 4.9. Work effectively with others as a member or leader of a multidisciplinary health care team.
  - 4.9.1. Effectively manage and negotiate differences of opinion between conventional and CAM providers.
  - 4.9.2. Demonstrate effective leadership as an expert in incorporating the range of therapeutic options in patient care.
- 4.10. Develop effective relationships with referring, consulting, and collaborating physicians and other health professionals.
  - 4.10.1. Communicate integrative care assessment and plan recommendations to other physicians and health professionals.
  - 4.10.2. Communicate with health care providers when there is a disagreement about treatment plans and works towards building a consensus.
- 4.11. Maintain comprehensive, timely, and legible medical records.
  - 4.11.1. Effectively and efficiently communicate an integrative medicine approach through the medical record.
  - 4.11.2. Adapt documentation to medical record formats required in different settings.

**Footnote:**

\* Examples of controversial topics in integrative medicine include: hair testing for nutritional status, non-FDA approved uses of hyperbaric therapy, intravenous chelation, unconventional approaches to childhood vaccinations, autism treatment, and various fad diets.

## 5. PROFESSIONALISM

*The integrative medicine fellow should be able to demonstrate professionalism, as manifested through a commitment to carrying out professional responsibilities, adherence to ethical principles, sensitivity to a diverse patient population, and appropriate self-reflection.*

- 5.1. Demonstrate commitment to carrying out professional responsibilities.
  - 5.1.1. Respond in a timely manner to patient requests for medical information or guidance.
  - 5.1.2. Respond to requests for assistance from colleagues.
  - 5.1.3. Fulfill professional responsibilities and work effectively as a team member.
  - 5.1.4. Recognize own role and role in the system to disclose and prevent medical errors.
  - 5.1.5. Demonstrate compassion, integrity, and respect for patients, families, co-workers and other clinicians.
- 5.2. Demonstrate the highest ethical standards including maintaining strict patient confidentiality, ensuring adequate informed consent, and informing patients of all practical therapeutic options.
- 5.3. Demonstrate sensitivity to diverse patient populations.
  - 5.3.1. Demonstrate compassion, integrity, and respect to a diverse patient population, including but not limited to diversity in gender, age, culture, race, ethnicity, religion, disabilities, and sexual orientation.
  - 5.3.2. Demonstrate an awareness of his/her role in reducing suffering and enhancing quality of life of patients from diverse populations.
- 5.4. Demonstrate commitment to self-care and optimizing wellness of others.
  - 5.4.1. Demonstrate appropriate capacity for self-care in order to better care for one's patients.
  - 5.4.2. Recognize and treat the signs and symptoms of fatigue, burnout, and personal distress among colleagues and oneself.
  - 5.4.3. Strive for balance between the needs of patients, colleagues, family, friends, and self.
  - 5.4.4. Contribute to team wellness.
  - 5.4.5. Model to patients and colleagues self-awareness, self-care, and a healthy lifestyle.

## 6. SYSTEMS BASED PRACTICE

*The integrative medicine fellow should be able to demonstrate an awareness of and responsiveness to the larger context and system of health care. The fellow should have the ability to effectively call on system resources to provide care that is of optimal value.*

- 6.1. Demonstrate understanding of how integrative patient care affects other health care professionals, the health care organization, and the larger society.
  - 6.1.1. Describe national and state standards related to training, licensing, credentialing, and reimbursement of CAM practitioners.
  - 6.1.2. Identify ethical and legal issues impacting the practice for integrative medicine physicians including documentation, patient consent, and relationship to standard of care.
  - 6.1.3. Define special regulations related to the practice of any specific CAM modality learned during the fellowship. \*
  - 6.1.4. Explain the impact of current policies and trends # on integrative care.
- 6.2. Describe and compare different integrative practice models and delivery systems in terms of patient access, resource allocation, reimbursement, health care costs, and financial sustainability.
- 6.2. Practice cost-effective integrative health care and resource allocation that does not compromise quality of care.
  - 6.2.1. Integrate conventional, evidence-based CAM, preventive strategies and lifestyle medicine to provide cost-effective care.
  - 6.2.2. Develop strategies to optimize wellness and quality of life for the individual patient in a cost-effective manner.
- 6.3. Advocate for access to quality patient care and assist patients in dealing with system complexities.
  - 6.3.1. Identify local, regional, and national resources available to patients seeking integrative medicine care.
  - 6.3.2. Call effectively on system resources to contribute to high-quality integrative patient care.
  - 6.3.3. Identify strategies for facilitating access to integrative medicine services to all patients regardless of ability to pay.
  - 6.3.4. Describe patterns of healing modalities used in the local patient population.
- 6.4. Partner with health care managers and providers to assess, coordinate, and improve patient safety, outcomes, and system performance.
  - 6.4.1. Demonstrate the ability to participate effectively on an interdisciplinary integrative care team with an emphasis on collaboration, relationship building, co-management, consultation, and referral skills.

- 6.4.2. Develop a network of professional colleagues in integrative medicine research, clinical care, and teaching.
  - 6.4.3. Collaborate with community CAM practitioners and other health care specialists in the care of patients, while understanding legal implications and appropriate documentation issues.
- 6.5. Design, implement, and evaluate an integrative medicine continuous quality improvement programs.

**Footnotes:**

\*Examples of modalities include acupuncture, manual manipulation and medical hypnosis.

# Examples of high-profile issues in policy and societal trends include health care reform, patient care outcomes research, medical home model, obesity epidemic and cost effectiveness.