

MAc-CHMS Portfolio Requirement

Students in the MAc-CHMS program must complete a portfolio in order to graduate. The portfolio will contain items that span the length of the program and will include works from clinic rotations as well as from various courses, practical exams, and non-curricular professional development. Each student will have periodic reviews to monitor progress and contents. Upon completion of the program and final review, the portfolio is retained by the student.

Contents are revised periodically – please refer to the most current portfolio. The MAc-CHMS Portfolio Packet 2019 is the most current version.

Reflections

A fundamental feature of the clinical education portfolio is the reflection requirement. Researchers identify benefits of reflection for learners such as: increased awareness of different perspectives, depth, and professional expertise.¹ Reflective practice has been identified as particularly essential for health care practitioners. A study in postgraduate medical education found that reflection plays a vital role in helping junior doctors to learn from clinical experiences.²

- It has been shown to help develop critical thinking skills and clinical judgment, as well as improve diagnostic accuracy.¹
- Through reflection, the student is able to assess knowledge with their own values and beliefs, resulting in improved empathy and effective care.¹
- Reflecting on clinical experiences resulted in the student's identification of their learning needs. This encouraged learning focused on comprehension and understanding.²

1. Wald, Hedy, et. al., *Reflecting on Reflections: Enhancement of Medical Education Curriculum With Structured Field Notes and Guided Feedback: Academic Medicine*, 2009. 84(7): p. 830-837.

2. Driessen, Erik, et. al. *The Self-Critical Doctor: Helping Students Become More Reflective. Teaching Rounds*, 2008. 336: p.827-829.

3. Sandars, John. *The Use of Reflection in Medical Education: AMEE Guide No. 44. Medical Teacher*, 2009. 31: p.685-695.

How to Reflect

Reflection takes time and effort. It is a cognitive process for viewing mental and emotional states and behaviors. Reflection is more than reciting the SOAP note or events as in a narrative. Reflection involves awareness of self on many levels, including values, beliefs, attitudes, behaviors, and emotional state at any given moment in time. Reflection involves awareness of others including listening to their perspectives, acknowledging other opinions and experiences as valuable, observing their emotional reactions, and connecting acquired information back to oneself. Reflection involves deeply thinking about lessons learned, and most importantly, how this might change one's own future behavior, attitudes, and beliefs.

Written submissions that are narratives showing no depth of reflection will not be accepted as a portfolio entry. Not all portfolio entries require a reflection.

Portfolio Contents

A checklist of the portfolio items is at the end of the portfolio section.

Observation SOAP Notes and Reflections

Students will spend a minimum of 144 hours as an observer prior to beginning internship, in clinic theater courses as well as in the student clinic. Toward the end of the program, students will enroll in advanced clinic theater or observe clinic in China on the China Study Trip. The form used to record patient visits is AOMA's standardized SOAP note (SOAP stands for subjective, objective, assessment, and plan.).

The portfolio requires three replicated SOAP notes from observation at the pre-internship and three from observation at the advanced level (Level 3) or one advanced reflection if the student went on the China Study Tour (this reflection should be longer and compare and contrast between practice in China and the USA). Observers will use their notes from a patient visit to replicate a SOAP note, and write a reflection on the visit. HIPAA compliance is an absolute requirement.

Internship SOAP Notes and Reflections

Students will spend a minimum of 720 hours as an intern in the student clinics and community clinics.

Interns will use their notes from a patient visit to replicate a SOAP note, or bullet the salient points, and write a reflection on the visit. HIPAA compliance is an absolute requirement. A specific form can be used for the internship SOAP. The actual SOAP form from the patient file can be copied by clinic staff with patient name redacted.

The portfolio requires 3 types of SOAP notes from internship patient visits for a total of 15 SOAP notes and 9 reflections.

- **3 acupuncture patient visits with a reflection on each**
- **3 patient visits when the intern was an herbal-only intern (level 3) with a reflection on each**
- **3 patients who the intern saw at least 3 times. Student is to write one reflection for each set of 3 SOAP notes with emphasis on patient outcomes.**

Checklist of Procedures and Skills

Another clinical requirement of the portfolio is completion of several checklists of procedures and skills accomplished in clinic. These lists are composed of wide variety of skills taught in the program and utilized during patient visits, such as needling, moxa, cupping, physical assessments, and so forth. For the complete lists please refer to the checklist forms at the end of this packet. Most of the procedures and skills on the checklist will be assessed in the student clinics while being performed on patients. When an intern competently demonstrates the procedure or skill on a patient while a supervisor observes, the supervisor will sign the intern's checklist for that item. If the intern requires assistance or correction, or in any way does not perform competently, the supervisor uses the opportunity to train the intern and will not sign the checklist. For level 1 interns who have an assigned resident, the resident will sign the checklist when an intern is performed competently. For pre-internship observers, treating interns may sign the form. The checklist for procedures and skills must be maintained in hard copy for supervisor signatures. To safeguard against loss, it is highly recommended that these forms periodically be scanned or photographed and saved electronically, or photocopied and kept in a separate location from the original. Original checklists must be completed and handed in to the registrar's office, and a copy kept in the portfolio.

Formative Evaluations, Self-Assessments, and Learning Goals

Every term, interns should do a self-evaluation on themselves on their strengths and weaknesses. In doing so, they can identify their learning needs.

For this portfolio requirement, students select 3 terms of internship, one at each level, to reflect:

- Self-reflection of strengths and weaknesses,
- Self-identification of learning goals and learning plan, and
- Commitment to act.

Practical Exam Scores (OSCEs) and Reflections

Interns take the level 1 practical exam when total observation and internship hours are between 288-324, and take the second level practical exam when total hours are 576-720. This portfolio requirement is to write a ½-1 page reflection for each exam on what was learned and commitment to improve as a result of the exam.

Advance Clinical Rotations

Students advance through three levels of internship. In Level 3, interns complete two advanced level rotations of their choice (refer to Level 3-Herbalist Checklist of Procedures and Skills). These rotation offerings may vary, but include integrative clinical settings, specialty practice, and fast-paced practice. Students must answer these questions at the portfolio reviews:

- What terms (term and year) did you do advanced clinics?
- What two advanced clinics did you do?
- This rotation was useful for preparation into professional practice? On a scale of Fully agree, Agree, Neutral, Disagree, Fully Disagree)

Coursework

Students are to select a minimum of three (3) works from classes for their portfolio. Coursework requirements do change over time. The following are possibilities:

- Case Management class, such as Philosophy of Practice, Plan of Care
- Evidence-Based Practice class, such as individual project
- Acupuncture & herbal treatment of disease research paper(s)
- Practice Management (business plan); Ethics (essay)
- Case Report from advanced clinic theater or another course
- Other clinically relevant coursework

Letter Template

Students need to create two templates for inter-professional letters to other healthcare professionals that can be used in the student clinic and in their future professional practice. These two templates should be:

1. A letter to refer a patient to another practitioner, such as a physician (letter is to the practitioner).
2. A letter to report on a patient's progress back to a practitioner who referred the patient [to you].

Professional Development

Students are to create a resume or CV. In addition, students are to select a minimum of four (4) other examples of professional development as a traditional Chinese practitioner that were not required for the degree. The following are possibilities:

- Non-curricular training related to AOM practice (seminars, symposiums, etc.).
- Professional memberships (TAAOM, AAAOM, etc.)
- Attendance to National Meetings, activities, etc.
- Participation in AOMA Tutoring Program as a tutor, ASA as an officer, student representative on school committees, or other school leadership roles.

- Volunteer work at Health Fairs, Great American Smoke-out, SWS, etc.

Written Case Report – Advanced Clinic Theater, Case Management, Evidence-based Medicine, etc.

Written case reports are assignments in 2-3 courses. In a portfolio review, the students answer the following Yes-No questions that begin with: “Did you...?”

- Utilize biomedical knowledge in context of Oriental medical practice
- Perform literature reviews
- Record and compare initial assessments and outcome measures
- Utilize evidence and experience to inform clinical decision making

Personal Final Review and Retrospective Reflection

As the final item in the portfolio, this is to be completed at the end of the final term of the program. Each student does a personal review of all reflections and portfolio entries and writes a final reflection.

This reflection is on personal growth and transformation during journey of becoming a practitioner of acupuncture and Oriental medicine, along with future learning goals, personal insights on strengths and weaknesses, and level of commitment to the ideals of professionalism.

Typically, this reflection is typed, single spaced, 10-11 font size, and about two pages in length.

A copy of this item will be scanned and filed on AOMA's server. It will also be used in administrative assessments of the MAc-CHMS program, and achievement of AOMA's mission.

Formative and Summative Portfolio Reviews and Evaluation

Formative portfolio reviews will be conducted to assess progress of content and depth of reflection. These will be conducted by the MAc-CHMS program director, the dean of students, and academic advisors.

Portfolio Grading

Two measures are used to grade a portfolio: 1) completeness, and 2) quality of reflections. Contents reviewed at portfolio reviews are recorded in the REDCap database. Reflections are read and discussed between the student and the reviewer. The reflections are scored according to this scale:

- Not acceptable
- Minimal, Needs Work
- Average, Possible Discovery
- Reflective, Some Discovery
- Deeply Reflective with Self Discovery

After successful completion of the portfolio, the portfolio final review is recorded in REDCap and the grade submitted via CAMS portal for the student's academic records.

Portfolio Maintenance

Students are required to maintain their portfolio themselves, in hard copy, electronically, or a combination of both. They must bring the portfolio to reviews. The portfolio should be organized in an orderly fashion for easy access and review, and all handwritten artifacts must be legible. Files must be readable from PC computers utilizing Microsoft® Office software or Adobe® Reader. Contents may be submitted to a reviewer a couple of days prior to the review, but is not required. It is recommended that learners store their electronic copies in multiple locations, such as their computer, a back-up hard drive, burned to DVD, in Google Documents, Drop Box, or similar storage method.

Portfolio Tips

1. Hard Copy
 - a. Use a hard 3-ring binder with a plastic slip covers to display materials.
 - b. Create a Table of Contents.
 - c. Use dividers and tabs to separate all sections.
 - d. Maintain a copy of everything in separate location.
2. Electronic Copy
 - a. Use Google Documents, DropBox, or similar storage method for safe storage, or keep in multiple locations.
 - b. Use the scanner available in the library to scan documents and e-mail to yourself.
 - c. Bring to a review on a thumb-drive or internet access.

MAc-CHMS Portfolio Contents Checklist (Revised February 2019)

Name: _____

Page 1 FOCUS AND PURPOSE: PRACTICE BASED GROWTH

Procedural Checklists)	Completion of checklist(s) –one for each level of internship plus a pre-internship observation checklist.	Observe	Level 1	Level 2	Level 3- Herbal
6 Observation reflections*	3 pre-internship SOAPs with reflections (level 0)				
	3 advanced observation SOAPs with reflections (level 3)				
9 Treatment reflections*	3 patient SOAPs with reflections (minimum of 2 patients that are new to the AOMA clinics).	New Patient	New Patient		
	3 herbal patient SOAPs with reflections (minimum 2 patients that were seen when enrolled as an herbal-only intern).				
	3 sets of 3 – 3 patients who were seen at least 3 times in the same term. Include pre- and post- assessments and outcomes analysis in reflection.				
Level 1 Practical Exam*	Reflection after completion				
Level 2 Practical Exam*	Reflection after completion				
Formative Self-reflections and Learning Goals	3 self-reflection of strengths and weaknesses, and self-identified learning goals (1 for each level of internship), and commitment to act. See template chart.	Level 1	Level 2	Level 3	
Written Case Study from Advanced Clinic Theater, Case Management, Evidence-Based Practice, or other course – answer Y/N for each:	<ol style="list-style-type: none"> Utilize biomedicine in TCM context? Perform literature reviews? Record/compare outcomes measures? Use evidence/experience for decisions? 				

* Reflection takes time and effort. It is a cognitive process for viewing mental and emotional states and behaviors. Reflection is more than reciting the SOAP note or events as in a narrative. Reflection involves awareness of self on many levels, including values, beliefs, attitudes, behaviors, and emotional state at any given moment in time. Reflection involves awareness of others including listening to their perspectives, acknowledging other opinions and experiences as valuable, observing their emotional reactions, and connecting acquired information back to oneself. Reflection involves deeply thinking about lessons learned, and most importantly, how this might change one's own future behavior, attitudes, and beliefs. See the portfolio packet for details.

Name: _____

Page 2 **FOCUS: PROFESSIONAL DEVELOPMENT AND SUCCESS**

These items are geared toward professional success and should be selected according to your vision for your career. For example, if you are looking to go into private practice, consider collecting and honing your business plan and research papers that can be translated to written pieces for your website. If you are looking to work at a hospital, focus on case reports you can take to an interview to show you will propel their research efforts.

Coursework	Student to select three pieces of course work and describe to the reviewer why each was chosen. Essays, business plan, research papers, case presentations, etc.	1.		
		2.		
		3.		
Letter Templates	to Refer Patient Out to another Practitioner			
	to Report Patient Progress to Referring Practitioner			
Advanced Clinical Rotations Select rotations to help your career goals such as fast-paced practice, addiction recovery, VA, etc.	Level 3 interns complete two different advanced level rotations (see Level 3-Herbalist Checklist of Procedures and Skills). Students must answer questions during portfolio review (T-YR, Type, Usefulness).	Term-Yr		
		Type		
		Useful?		
Professional Development	CV or resume (required); Student to select a minimum of 5: Certificates of completion/achievement from non-curricular training (informal series, seminars, symposium, etc.); Professional memberships; Attendance to State/ National Meetings, etc. Tutor in AOMA Tutoring Program, active in ASA or Clinic Leadership Team, Mentoring, etc.; Volunteer work at Health Fairs, Great American Smoke-out, SWS, etc.	1. CV or resume.		
		2.		
		3.		
		4.		
		5.		
3 Formative	Formative Academic Evaluation			
Personal Final Review and Retrospective Reflection	Retrospective reflection on growth, transformation, strengths and weaknesses, commitments to act.			
Summative Review	Final Academic Evaluation (date and signature)			

Review	Timing and completed coursework	Content Expectation
1 st Formative Review	During the term prior to internship while in clinic theater 2.	3 Observation SOAP notes with written reflections. Completion of observation checklist.
2 nd Formative Review	During term of level 1 practical exam (usually 2 nd term of internship).	At least 3 internship reflections, level 1 self-evaluation with learning goals, reflection on level 1 practical exam, and level 1 checklist.
3 rd Formative Review*	During the term of level 2 practical exam (usually ~3 terms before graduation).	1+ 3-sets-of-3 patient visit SOAPs with reflection, reflection on level 2 practical exam, additions of professional development to CV, level 2 self-reflection and learning goals, 1+ coursework, and level 2 checklist.
Summative Review	Upon completion of the portfolio it is assessed for completeness of contents and quality of the reflections.	Completion of entire portfolio – requirement of graduation.

Checklist of Procedures and Skills – Pre-Internship Observer

Name: _____

All items must be witnessed and evaluated by the supervisor signing off. These are to be done in clinic during regular treatment sessions or during practice labs.

Competency – Demonstrated in Clinic	Date	Supervisor (print name)	Supervisor (signature)	Comments
Assist Supervisor in Room Set-up and Tear-Down (i.e. sheets & gowns set-up and disposal, cleaning surfaces, collecting charts, etc.)				
Assist Supervisor in Safety Check Before and After Session, unplugging heat lamps, and other safety issues.				
Assist Supervisor in Cleaning of Cups.				
Attend a minimum of SIX practice labs (1 hour per lab – schedule varies by term)				
List of Clinical Pearls gained Clinical Pearl definitions: <ul style="list-style-type: none"> • A short, straightforward piece of clinical advice • Refers to a tip about how to make examination, documentation, diagnosis, or treatment more effective. • Something precious or choice: <i>pearls of wisdom</i>. 				

Checklist of Procedures and Skills – Level 1

Name: _____

All items must be witnessed and evaluated by the supervisor or resident is signing off. These are to be done on patients during regular clinic treatment sessions. Sign-off only if item was demonstrated safely and competently without assistance. CNT must be demonstrated for competency. CNT, clean hands, clean fields, skin prep, needling, and proper disposal of contaminated items of expected every treatment session.

Competency – Demonstrated in Clinic	Date	Supervisor (print name)	Supervisor (signature)	Comments
Palpation of points or along channels or abdomen for tenderness				
Tongue and Pulse; All Vitals Measurements				
Perform and record Range of Motion Measurements, muscle strength				
Perform and record peripheral neurologic system exam (PNS) (peripheral pulses, reflexes, dermatomes, myotomes)				
Needle insertion and obtaining arrival of Qi; needle withdrawal				
Accurate point location, angle, depth of insertions				
Safe technique (insertion, angle, manipulation, withdrawal) of front and back thoracic points.				

Checklist of Procedures and Skills – Level 1

Safe technique (insertion, angle, manipulation, withdrawal) of neck points.				
Safe technique (insertion, angle, manipulation, withdrawal) of points near/around eyes (ST1, taiyang, yintang, etc.)				
Perform cupping effectively and safely				
Perform gua sha effectively and safely				
Safe and appropriate use of moxa				
Safe therapeutic use of heat lamp				
Review patient special needs/requests and discuss with resident/supervisor.				

Checklist of Procedures and Skills – Level 2

Name: _____

All items must be witnessed and evaluated by the supervisor signing off. These are to be done on patients during regular clinic treatment sessions.

Supervisor is to sign-off only if item was demonstrated safely and competently without assistance. CNT must be demonstrated for competency.

Competency – Demonstrated in Clinic	Date	Supervisor (print name)	Supervisor (signature)	Comments
Bleeding with lancet or 3-edge needle				
Plum Blossom Needling or Seven-Star Needling				
Scalp Acupuncture				
Auricular acupuncture				
Tacks, seeds, or magnets				
E-Stim				
Prescribe and discuss dietary and lifestyle changes with patients				
Teach patient benefits of mind-body exercises (taiji or qigong) provide information on AOMA informal classes				
Review patient needs/request and apply for reduced fees/herbs (herbal outreach)				
Review patient needs/request and apply for RRP (reduced rate plan - reduced fees/herbs, also called herbal outreach)				
Review assessments for patient-centered outcomes and discuss patient-centered prognosis and/or outcomes with supervisor				
Assess medications and supplements for potential interactions with manual and herbal therapies				

Checklist of Procedures and Skills – Level 3 & Herbalist Checklist

Name: _____

All items must be witnessed and evaluated by the supervisor or AHM Staff (for dispensing only) during regular clinic treatment sessions.

Competency – Demonstrated in Clinic or AHM Dispensary	Date	Supervisor (print name)	Supervisor (signature)	Comments
Herbal safety application: ask patient food allergy, check herb-drug interaction, religious considerations (animal parts)				
Discussing herbal remedies with patient along with cost of remedies and achieving patient agreement before filling order.				
Educating patient on why herbal prescription is recommended and possible side effects				
Dispensing powder Rx's				
Prescribing patent, tincture, and/or topical RXs – appropriate for patient case with minimal change by Faculty Supervisor.				
Prescribing bulk and/or powder Rx's appropriate for patient case with minimal change by faculty supervisor and provides administrative instructions				
Writing and discussing TCM Nutrition and Dietary recommendations in lieu of herbal prescription.				

Checklist of Procedures and Skills – Level 3 & Herbalist Checklist

	Term & Year	What type of rotation/where	Supervisor
Complete 2 rotations at level 3 as available: <ul style="list-style-type: none"> - Solo practice seeing 3 patients in 3 hours. - Dual room practice seeing 4-5 patients in 3 hours. - Specialized clinic (pediatrics, sports injury, facial, etc.) - Specialized style (tuina, medical qigong, etc.) - Integration rotations at Addiction Recovery Center, VA, etc. (excluding community clinics, Cureville, festivals, etc.) 			