



Professional Development Activity

# PDA Handbook

*National Standards of Continued  
Competence in Acupuncture  
and Oriental Medicine*

July 24, 2020



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## NCCAOM® Mission

*To assure the safety and well-being of the public and to advance the professional practice of acupuncture and Oriental medicine by establishing and promoting national evidence-based standards of competence and credentialing.*



## NCCAOM® Vision

*Acupuncture and Oriental medicine provided by NCCAOM credentialed practitioners will be integral to healthcare and accessible to all members of the public.*

## NCCAOM PDA Provider Digital Badge



*In recognition of PDA Providers who partner with NCCAOM to provide quality continuing education courses that assist Diplomates to meet national standards of continued competence in acupuncture and Oriental medicine.*



## NCCAOM PDA Activities

*Quality education coursework that meets continuing education standards and NCCAOM recertification requirements in acupuncture and Oriental medicine.*

NCCAOM  
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**Non-Discrimination Policy:** The NCCAOM® does not discriminate on the basis of race, color, age, gender, sexual orientation, political or religious beliefs, handicap, marital status, or national origin.



## About the NCCAOM®

Founded in 1982 as a non-profit certification organization, the National Certification Commission for Acupuncture and Oriental Medicine (NCCAOM®) is widely accepted as the most influential leader in the field of certification for acupuncture and Oriental medicine (AOM). NCCAOM's purpose is to assure the public that Diplomates meet entry-level skills and continued competencies in their profession by evaluating and attesting to rigorous eligibility standards that demonstrate and assess the core knowledge, skills and abilities of an AOM practitioner.

## NCCAOM® Mission

*To assure the safety and well-being of the public and to advance the professional practice of acupuncture and Oriental medicine by establishing and promoting national, evidence-based standards of competence and credentialing.*

## NCCAOM® Vision

Acupuncture and Oriental medicine provided by NCCAOM credentialed practitioners will be integral to healthcare and accessible to all members of the public.

## NCCAOM® Certification Programs

The NCCAOM certification programs include Oriental Medicine (OM), Acupuncture (Ac), and Chinese Herbology (CH). The Asian Bodywork Therapy (ABT) program no longer offers examinations, however the current ABT Diplomates may keep their NCCAOM board certification by maintaining their continued competencies. The three certification programs are accredited by the National Commission for Certifying Agencies (NCCA) that exceed the requirements set forth by the American Psychological Association and the United States Employment Opportunity Commission.



Oriental Medicine  
Dipl. O.M. (NCCAOM)®



Acupuncture  
Dipl. Ac. (NCCAOM)®



Chinese Herbology  
Dipl. C.H. (NCCAOM)®

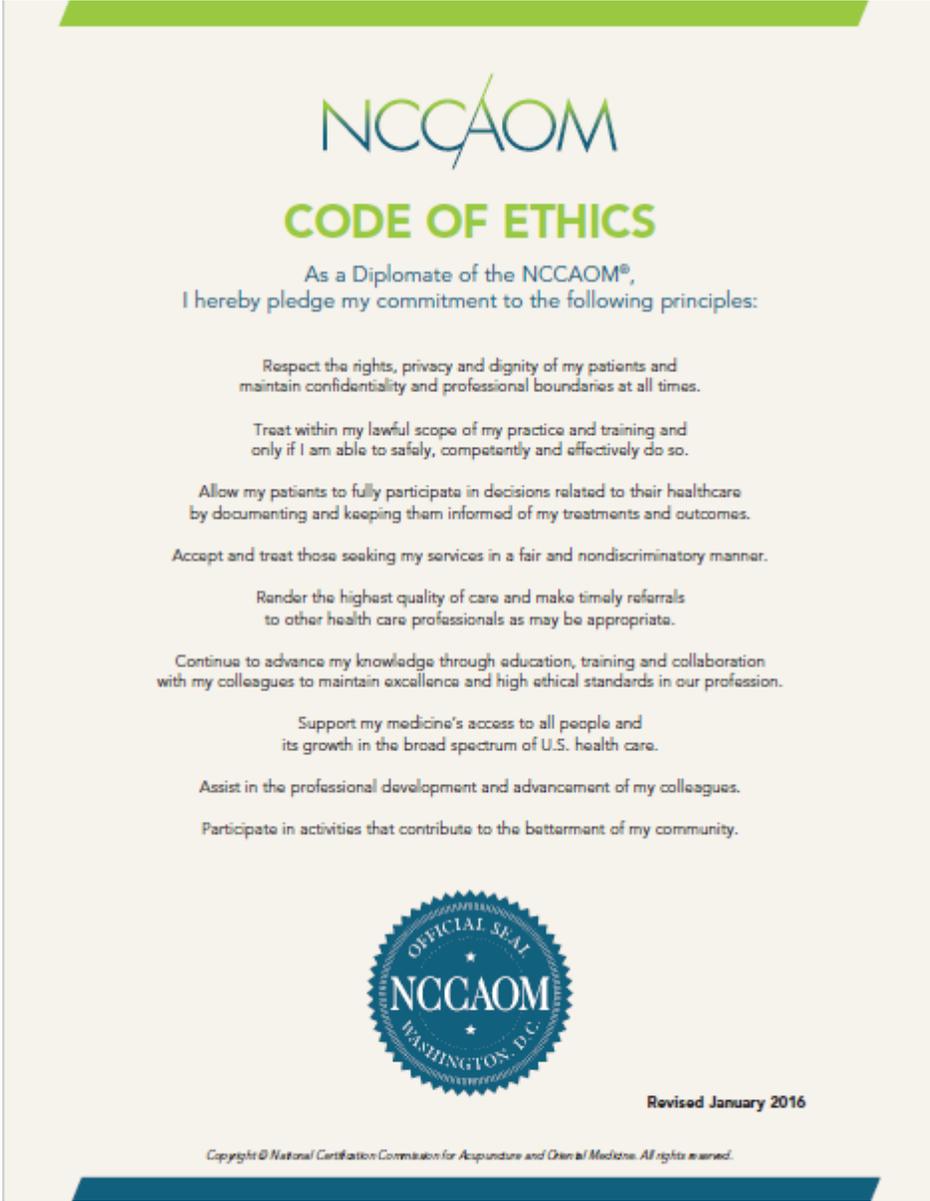


Asian Bodywork Therapy  
Dipl. ABT (NCCAOM)®



## NCCAOM Code of Ethics

All practitioners certified by the NCCAOM are committed to responsible and ethical practice, to the growth of the profession within the broad spectrum of American healthcare, and to their own professional growth. All Diplomates, applicants and candidates for certification are bound by the [NCCAOM<sup>®</sup> Code of Ethics](#) and the *NCCAOM<sup>®</sup> Grounds for Professional Discipline*.



**NCCAOM**

**CODE OF ETHICS**

As a Diplomate of the NCCAOM<sup>®</sup>,  
I hereby pledge my commitment to the following principles:

- Respect the rights, privacy and dignity of my patients and maintain confidentiality and professional boundaries at all times.
- Treat within my lawful scope of my practice and training and only if I am able to safely, competently and effectively do so.
- Allow my patients to fully participate in decisions related to their healthcare by documenting and keeping them informed of my treatments and outcomes.
- Accept and treat those seeking my services in a fair and nondiscriminatory manner.
- Render the highest quality of care and make timely referrals to other health care professionals as may be appropriate.
- Continue to advance my knowledge through education, training and collaboration with my colleagues to maintain excellence and high ethical standards in our profession.
- Support my medicine's access to all people and its growth in the broad spectrum of U.S. health care.
- Assist in the professional development and advancement of my colleagues.
- Participate in activities that contribute to the betterment of my community.



**Revised January 2016**

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## NCCAOM Grounds for Professional Discipline

Protection of the public is the highest priority of the NCCAOM. To fulfill this mission, the NCCAOM reserves the right to take and publish disciplinary actions taken against Respondents, (as defined by Section 1 of the *Procedures for Upholding Professional Conduct*), in accordance with its *Procedures for Upholding Professional Conduct* for violations of the following:

1. Failing to cooperate with a disciplinary investigation.
2. Providing false or deceptive information on an application for NCCAOM certification, recertification, PDA Providership or disciplinary investigation.
3. Violating NCCAOM policies, regulations or procedures, including but not limited to complying with continuing education requirements.
4. Misrepresenting professional credentials or titles.
5. Advertising false or misleading information.
6. Exceeding the scope of practice as defined by state or federal statute or regulation.
7. Obtaining or attempting to obtain compensation or reimbursement through fraud.
8. Failing to notify the NCCAOM within thirty (30) calendar days of any of the following:
  - a. Notice of a disciplinary investigation in any jurisdiction pertaining to a healthcare practice.
  - b. Any order issued by any jurisdiction pertaining to a healthcare practice.
  - c. Violent felony charges.
  - d. Violent or non-violent felony convictions.
  - e. Misdemeanor criminal convictions related to a healthcare practice.
9. Being convicted of a felony. (Note: Pursuant to Section 3, #10 of the *Procedures for Upholding Professional Conduct*, serious violent felonies may deem a candidate permanently ineligible for NCCAOM certification, recertification or PDA Providership).
10. Being convicted of a misdemeanor related to a healthcare practice.
11. Being the subject of disciplinary or administrative action taken by a licensing board or health-related regulatory agency or school.



12. Failing to maintain proper records as required by state or federal statute or regulation.
13. Performing services without informed consent as required by state or federal statute or regulation.
14. Failing to maintain patient/practitioner confidentiality.
15. Failing to maintain professional boundaries in relationships with patients, or in any way exploiting the practitioner/patient trust.
16. Engaging in sexual contact with a current patient if the contact commences after the practitioner/patient relationship is established.
17. Engaging in sexual contact with a former patient unless a period of six (6) months has elapsed since the date that the professional relationship ended.
18. Gross negligence or a pattern of negligence in your practice or under your supervision.
19. Being unable to safely and effectively engage in practice due to substance abuse, physical or psychological impairment.\*

**\*(Summary of PEDC Substance Abuse Policy Statement:** A Respondent whose capacity to safely and effectively treat patients has been diminished as a result of drug or alcohol abuse which has not resulted in harm to a patient, may temporarily and voluntarily surrender NCCAOM certification by forwarding his/her certificate to NCCAOM and temporarily withdrawing from practicing in order to complete an agreed upon treatment plan as decided by the PEDC. Upon the PEDC's receipt of a certificate of disposition from the pre-approved treatment facility, Respondent shall be returned their *NCCAOM PDA Certificate of Completion* and resume practice. A surrender of certification under this provision shall be confidential and shall not be considered an admission of abuse, disability or a violation of the Ground for Professional Discipline # 21. However, this surrender shall not confer immunity upon Respondent with respect to any other Grounds for Professional Discipline and is unilaterally revocable by PEDC in the event the agreed treatment was not completed or harm to a patient has occurred.)

20. Violating federal or state statute or regulation relating to safe, ethical, and/or competent practice.



## NCCAOM® Recertification Requirements: Categories and Curricula

The PDA program is designed to ensure that NCCAOM Diplomates are participating in quality educational programs that maintain their core competencies and provide ongoing professional development. By learning the NCCAOM recertification categories and curricula for each, PDA Providers will have a better understanding of the types of courses the Diplomates are searching for.

To assist the Diplomates in their search for programs that apply to their recertification, the PDA and Recertification Departments have developed codes for the NCCAOM recertification categories. Providers are required to identify the NCCAOM recertification category their course addresses. The recertification categories have been added to the *NCCAOM® PDA Search Engine* and the *NCCAOM® PDA Certificate of Completion* making it easier for Diplomates and regulatory agencies to identify the type of courses applying toward recertification and state re-licensing.

### NCCAOM® Recertification Categories

**Core Competencies:** Courses that address the Knowledge, Skills, and Abilities (KSAs) outlined in the examination content outline in the *NCCAOM® Examination Study Guides*.

|         |   |
|---------|---|
| AOM-OM  | Oriental Medicine Foundation and Theory |
| AOM-AC  | Acupuncture                             |
| AOM-CH  | Chinese Herbology                       |
| AOM-ABT | Asian Bodywork Therapy                  |
| AOM-BIO | Biomedicine (Western Medicine)          |
| SA      | Safety                                  |
| ET      | Ethics                                  |

### Professional Enhancement:

|       |  |
|-------|--|
| PE-CW | Complementary and Integrative Therapies<br>Practice Management |
|-------|--|



## NCCAOM® Recertification At A Glance

Sixty (60) PDAs points or CEUs are required in a *four-year* NCCAOM recertification cycle. A CPR certificate is required.

### **Mandatory: Maintenance of Core Competencies in Acupuncture & Oriental Medicine.**

PDA points are awarded for active learning that is earned in a classroom or e-learning environment. One PDA point is equal to one hour of instructor-led learning. Diplomates are required to complete a minimum of 30 PDA points in any of the areas listed below. All 60 points may be earned in the Core Competency section.

|  |         |                                       |
|--|---------|---------------------------------------|
| 22 Points/Hours<br>in one or a<br>combination of<br>the categories | AOM-OM  | Oriental Medicine Foundation & Theory |
|  | AOM-AC  | Acupuncture                           |
|  | AOM-CH  | Chinese Herbology                     |
|  | AOM-ABT | Asian Bodywork Therapy                |
|  | AOM-BIO | Biomedicine/Western Medicine          |
| 2 Points/Hours   | SA      | Safety (required)                     |
| 2 Points/Hours   | ET      | Ethics (required)                     |
| 4 Points   | CPR     | CPR Certificate (required)            |

**Optional: Professional Enhancement** consists of coursework in complementary and integrative therapies and/or participation in professional activities. A maximum of 30 PDA points is available in this section. Remaining PDAs from the Core Competency section may also be applied to the PE-CW category.

**PE-CW** Coursework accepted in integrative and complimentary therapies.

**PE-AT** Approved professional activities.

### **AOM Volunteer Service Opportunities**

|                                    |                                    |
|------------------------------------|------------------------------------|
| Serve on a Professional Board      | 10 PDA points maximum (5 per year) |
| Advocate Legislation               | 10 PDA points maximum              |
| Donate Acupuncture and OM Services | 10 PDA points maximum              |
| NCCAOM Exam Item Writing           | 10 PDA points maximum              |
| ACAOM Site Visitor                 | 10 PDA points maximum              |

### **AOM Teaching & Scholarship Opportunities**

|   |                       |
|---|-----------------------|
| Clinical Supervision                        | 10 PDA points maximum |
| Teach or Lecture                            | 20 PDA points maximum |
| Research in Acupuncture & Oriental Medicine | 20 PDA points maximum |
| Publications                                | Varies                |

### **AOM Knowledge and Skills Opportunities**

|                                      |                       |
|--------------------------------------|-----------------------|
| Course Work                          | 30 PDA points         |
| Peer Reviewed Posters or Exhibits    | 10 PDA points maximum |
| Passage of NCCAOM Certification Exam | 20 PDA points maximum |
| Clinical Experience                  | 10 PDA points maximum |
| Tai Chi/Qigong Exercise              | 4 PDA points maximum  |

Visit the *NCCAOM® PDA Search Engine* at [www.nccaom.org/pda-program](http://www.nccaom.org/pda-program) to find approved courses.



## NCCAOM Professional Development Curricula

Below are examples of course topics in the Core Competency section of the NCCAOM recertification requirements. The subject areas are not all-inclusive and meant as examples for guidance as PDA Providers and instructors develop new course curriculum.

### Core Competencies in Oriental Medicine, Acupuncture, Chinese Herbology, Asian Bodywork Therapy, and Biomedicine

**AOM:** Theory and foundation of acupuncture and Oriental medicine including diagnosis, treatment, patient management and education, medical qigong, and nutrition.

**Biomedicine:** Established and evolving clinically relevant western medicine and its application to AOM patient care.

1. Clinical Application of Biomedical Sciences
2. Patient History and Physical Examination
3. Clinical Assessment Process
4. Clinical Decision-Making and Standard of Care
5. Office Safety and Professional Responsibilities
6. Pharmaceuticals and supplements
7. Interpretation of clinical reports
8. Evidence-based practice to improve AOM medical treatments

**Patient Communication:** Effective information exchange using active listening skills and verbal/non-verbal communication.

1. Professional communication with patients, families, caregivers, and other healthcare professionals.
2. Patient counseling & lifestyle intervention
3. Compassionate care for patients
4. Practice in an integrative care setting
5. Patient referral

**Legal and Regulatory Compliance:** Legal aspects of treatments in practice

1. Federal
  - A. Regulatory compliance (HIPPA, CDC, OSHA, etc.)
  - B. Professional liability
  - C. Documentation and reporting requirements
2. State
  - A. Rules & Regulations
  - B. Scope of Practice
  - C. Documentation and reporting requirements



**SA: SAFETY:** The quality or condition of being safe; freedom from danger, injury, or damage; security. A mechanism on equipment/buildings designed to prevent accidents. *Webster's New World College Dictionary*, <http://websters.yourdictionary.com/>

**Herbal Safety:** Knowledge and skills in the safe handling and use of Chinese herbs.

1. Regulatory agencies and requirements
2. Documentation and reporting
3. Equipment and calibration
4. Compounding
5. Cautions and contraindications (condition-dependent, incompatibility)
6. Labeling & dispensing (lot numbers, expiration dates and procedures)
7. Management & storage
8. Toxicity
9. Herb-drug interactions & potential adverse effects

**Professional Safety:**

1. Federal and state requirements (OSHA, CDC, JACHO, State Board of Health)
2. Pathogens
  - A. Definition-infectious agent (micro-organism) that causes disease in host
  - B. Types (viral, bacterial, prion, fungus, protozoan)
  - C. Routes or pathways of transmission (air, blood, soil)
3. Communicable and infectious diseases (Hepatitis, HIV, MRSA, Ebola, etc.)
4. Infection Control
  - A. Universal precautions
  - B. Personal protective equipment (PPE)
  - C. Sterilization techniques
  - D. Medical waste management (Bio-hazardous)
5. Clean needle protocols – see CNT Manual
6. Patient Safety
  - A. Equipment and techniques (lamps, tools [qua sha, cups], instruments)
  - B. First aid stations
  - C. Documentation and reporting
7. Facility Safety
  - A. ADA accommodations
  - B. Emergencies
    1. Plans and procedures
    2. Patient assistance
    3. Staff training
  - C. Staff competence and training



**ET: ETHICS:** A branch of philosophy regarding concepts of right and wrong conduct, often addressing disputes of moral diversity. A decision-making process that determines a moral course of action a person is obligated to do in a specific situation. *Webster's New World College Dictionary*, <http://websters.yourdictionary.com/>

**Patient Ethics:**

1. Respect rights and dignity
2. Non-discrimination
3. Patient's right to treatment
4. Informed consent
5. Confidentiality – HIPPA and patient information
6. Boundaries and relationships
7. Documentation and records
8. State scope of practice
9. Patient referrals
10. Sexual contact

Note: The *NCCAOM Code of Ethics* is recommended content for PDA approved courses.

**Professional Ethics:**

1. Standards of the profession
2. Hierarchical relationships
3. Accurate and truthful information
4. Change in professional status
5. Patient relationship power differential
6. National and state regulatory policies
7. Respect of practitioners of AOM and other medical professions
8. Ethical business practices
  - A. Insurance billing and coding; taxes

**Public Ethics:**

1. Comply with state laws
2. Truthful information and advertising
3. Credentials and designations
4. Efficacy in treatment outcomes
5. State regulatory reporting

**PE-CW: Professional Enhancement:** Courses that relate to complementary and integrative therapies that enhance the Diplomate's practice but are not subjects originating in Oriental or Western medicine. Coursework in practice management. PDA points that are left over from the Core Competencies section may also be applied to this category.



## NCCAOM® PDA Program Overview

The mission of the NCCAOM is *to assure the safety and well-being of the public and advance the professional practice of acupuncture and Oriental medicine by establishing and promoting national evidence-based standards of competence and credentialing*. Achieving NCCAOM certification demonstrates the mastery of specific core competencies including knowledge, skills, and abilities required within an AOM professional practice; therefore, the focus of NCCAOM recertification is to maintain the core competencies and advance the professional growth and development of the Diplomate. To that end, the Professional Development Activity or “PDA” program was created as NCCAOM’s department of continuing education. All NCCAOM approved programs satisfy recertification requirements for NCCAOM Diplomates. The PDA program was created to provide an avenue for NCCAOM Diplomates to earn “PDA Points” (CEUs) for participating in recognized programs that apply toward NCCAOM recertification requirements. In turn, the NCCAOM PDA Department partners with individuals and organizations to provide these quality education programs.

NCCAOM’s PDA program began in 1990’s and has grown to over 1,500 PDA Providers and 3,000 approved courses. In 2007, 2011, and 2018 significant advances were made in the PDA Department demonstrating dedication to the NCCAOM Diplomates and PDA Providers.

Organizations and individuals interested in offering PDA points must first apply to become a PDA Provider. Once accepted, the Provider is eligible to submit a PDA course application, required documents, and the review payment to the PDA Department. The review includes evaluation of the course content, instructor qualifications, and supporting documents. When the course is approved, a PDA course number is assigned, and the Provider can issue PDA points to the attendees via an *NCCAOM® PDA Certificate of Completion*. The Diplomate may submit the official *NCCAOM® PDA Certificate of Completion* for recertification and to their state acupuncture board for re-licensing requirements. One PDA point is equal to one hour of active learning and/or instruction.



## NCCAOM PDA Provider Benefits

NCCAOM PDA Providers represent a significant achievement and commitment to the professional development of Diplomates and the practitioners in acupuncture and Oriental medicine. PDA Providers make an important statement regarding continued professional competency that is recognized by the profession, regulatory agencies, third-party payors, and the public.

- 
 Joining the NCCAOM as a PDA Provider is a life-time membership to the PDA program. Once approved, a unique NCCAOM PDA Provider number is issued that remains with the Provider for all time.
- 
 PDA Providers receive the benefit of a professional course review service that documents the quality and integrity of an AOM continuing education program.
- 
 Coming Soon! An *NCCAOM® PDA Provider Digital Badge* which showcases the Provider, their initiatives in continuing education and PDA approved courses. The digital badge is designed to be used in social media programs.
- 
 PDA Providers may utilize the *NCCAOM® PDA Activity Logo* that offers immediate recognition by AOM professionals of the course approval by NCCAOM.
- 
 Discounts are available to a PDA Provider who is an Active NCCAOM Diplomate, state acupuncture associations and those companies who are an PDA approved non-profit (501c3) organization.
- 
 To support our Providers, we offer Annual Discounted Review (ADR) packages where quantities of course applications may be purchased at a discounted rate.
- 
 PDA Providers benefit from a national advertising opportunity by posting approved courses to the *NCCAOM's PDA Search Engine* for continuous access by Diplomates and AOM practitioners. Optional advertising services are available via the *NCCAOM® PDA Course Spotlight* or the *NCCAOM® Course Highlights (coming soon)*.
- 
 PDA Providers enjoy an online PDA Management System that monitors approved courses, provides an instructor database and an automated *NCCAOM® PDA Certificate of Completion* distribution process.
- 
 PDA Providers receive additional recognition in states that require NCCAOM PDA courses for re-licensure.
- 
 PDA Providers receive excellent customer service provided by the PDA Department.





## COMING SOON! NCCAOM® PDA Provider Digital Badge

PDA Providers will be able to utilize an *NCCAOM® PDA Provider Digital Badge* which, when clicked on, showcases their providership, courses and other information about their continuing education efforts. Digital badges may be used on a website, resume, email, etc.



## NCCAOM® PDA Activity Logo

The NCCAOM is very excited to offer our PDA Providers use of the official *NCCAOM® PDA Activity Logo*. The logo can be used in advertising to promote active continuing education courses. The appearance of the PDA logo will immediately attract the viewer by visually showing the seal of approval by the NCCAOM. The PDA Activity Logo signifies a quality education program that has been approved by a leading national organization in the acupuncture and Oriental medicine profession.



## NCCAOM® PDA Search Engine

The *NCCAOM® PDA Search Engine* houses all the approved PDA courses and assists Diplomates and the public to find detailed class information that is assured to be accepted for NCCAOM recertification. The advanced, one-of-a kind PDA Search Engine also provides advertising benefits to the PDA Provider at no additional cost. Along with the *NCCAOM® PDA Activity Logo*, the *NCCAOM® PDA Search Engine* is one of several PDA advertising tools. We encourage PDA Providers to become familiar with the PDA Search Engine to better understand the information required on the PDA course applications.

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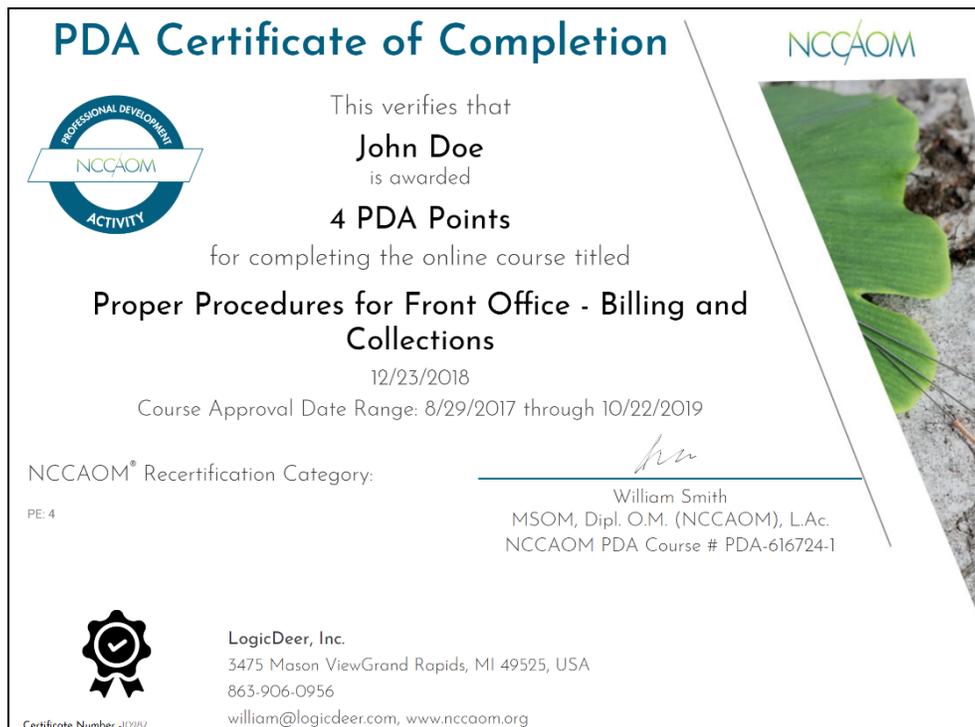


## NCCAOM® PDA Course Spotlight

The *NCCAOM® PDA Course Spotlight* is an optional benefit that assists the Provider in advertising their approved PDA course(s). The Spotlight is a monthly flyer that features up to 10 active courses which is emailed to all active NCCAOM Diplomates (18,000+). In addition, each edition of the PDA Course Spotlight is posted to the NCCAOM website and Facebook page for a period of 6 months. This advertising benefit is a great method to reach Diplomates across the U.S. and internationally. For more information, please contact the PDA Department at [pda@thenccaom.org](mailto:pda@thenccaom.org).

## NCCAOM® PDA Certificate of Completion

The PDA Provider is required to issue PDA points by way of an automated continuing education template called the *NCCAOM® PDA Certificate of Completion*. The NCCAOM retains the rights for all branding; however, the PDA Provider can customize the *NCCAOM® PDA Certificate of Completion* by adding the Provider's logo, responsible party's signature and additional continuing education approvals. The Provider must utilize an online PDA certificate distribution system for all attendees of a PDA approved course.





## NCCAOM PDA Provider Qualifications

The PDA Provider is the sponsor of a continuing education event and responsible for all logistical aspects of the course. The PDA Providership is a life-time membership.

1. NCCAOM PDA Provider Qualifications
  - A. A PDA Provider may be an individual, organization, or company and is not required to be educated in Oriental medicine or hold NCCAOM certification(s).
  - B. The continuing education sponsor's course content must address one of the NCCAOM recertification categories.
  - C. If the PDA Provider is a Diplomate, they must be at Active status in all NCCAOM certifications.
  
2. To become a PDA Provider, a continuing education sponsor must:
  - A. Create a PDA Provider account on the NCCAOM website.
  - B. Complete the *NCCAOM® PDA Provider Application*.
  - C. Upload the Responsible Party's (head of organization or company) professional resume or curriculum vitae.
  - D. Pay the one-time application fee as determined by the PDA Department. The fee is charged for the review of the NCCAOM PDA Provider application and is non-refundable.
  - E. Participate in an NCCAOM PDA Provider Interview.
  
3. The PDA Department will conduct a review of the applicant's information including the following areas (if applicable):
  - A. NCCAOM Diplomate verification and active status report.
    1. An applicant who has allowed one or more of their NCCAOM certification(s) to lapse must return to Active Diplomate status in all NCCAOM certifications. Current courses for the lapsed Provider will be inactivated until they return to Active Diplomate status.
    2. An applicant who has allowed their NCCAOM certification to terminate is eligible to apply because they are no longer considered an NCCAOM Diplomate.
  - B. State acupuncture license verification and status report, if applicable.

Note: Applicants who have had or are currently under disciplinary actions are not



necessarily denied eligibility as an NCCAOM PDA Provider. The NCCAOM® Professional Ethics and Review Department will review the case and provide a status determination.

- C. Verification of the resume/curriculum vitae for education, professional experience, and certification/licensure.
  - D. The applicant’s website will be evaluated to assure the content is aligned with:
    - 1. the *NCCAOM® Mission Statement*,
    - 2. the *NCCAOM® Code of Ethics*, and
    - 3. proper use of NCCAOM credentials and designations.
  - E. The PDA Department will conduct an NCCAOM PDA Provider Interview with the responsible party and contact person to confirm the applicant’s NCCAOM Provider information, review PDA Provider benefits, PDA policies, and provide guidance in the PDA course application procedure.
4. Applicants who are approved as an NCCAOM PDA Provider are issued a Provider number and are eligible to submit course(s) for review.
  5. The NCCAOM has the sole discretion to approve or deny the PDA Provider application. If denied as a PDA Provider, the applicant has the right to two levels of appeal. The applicant will be notified in writing within 30 days and provided with a reason for the denial. The applicant may appeal the PDA Department’s decision, in writing, within 30 days of the denial notice.

### NCCAOM PDA Provider Statuses

|                                 |   |
|---------------------------------|---|
| <b>A – Active</b>               | The PDA Provider currently has active course(s) approved by the PDA Department.   |
| <b>I – Inactive</b>             | The PDA Provider does not currently have active course(s) approved by the PDA Department. The Provider is eligible to submit course applications for review.  |
| <b>E – Expired</b>              | The PDA Provider has not had active course(s) approved by the PDA Department in four (4) or more years. The Provider’s online account is locked, and they cannot submit course(s) application(s). The Provider is required to participate in a reorientation and pay an administrative fee to re-establish their NCCAOM PDA Providership. |
| <b>DR – Disciplinary Review</b> | The PDA Provider is currently under disciplinary review by the Professional Ethics and Disciplinary Review (PEDR) Department. The Provider’s online account is locked, and they cannot submit course(s) application(s) until a decision is made by PEDR.  |
| <b>R – Revoked</b>              | The NCCAOM PDA Providership is rescinded. The PDA Provider must cease their involvement with the PDA program and advertising. The Providership is permanently closed and cannot be reopened.  |



## NCCAOM® PDA Provider Roles and Responsibilities

### Roles

**Responsible Party** is the person who is ultimately responsible for the NCCAOM PDA Providership and must sign the *NCCAOM® PDA Certificate of Completion*. This person is accountable for 1) the educational content meeting NCCAOM recertification requirements, 2) overseeing ethical advertising, 3) registering participants, 4) maintaining documentation for a minimum of seven (7) years, 4) distribution of the *NCCAOM® PDA Certificate of Completion* to all attendees and other duties as outlined in the Responsibility Section below.

**Contact Person** is an individual who interacts with the PDA staff in submitting course applications and monitoring the active/renewal course(s). It is not mandatory that a PDA Responsible Party have a contact person.

**Instructor** is the subject matter expert who teaches the course. The Responsible Party can be the instructor, or they can bring in other individual(s) to teach a course.

Note: Only one log-in account is assigned to the PDA Provider. If a Responsible Party has a Contact Person, they will need to share the log-in information.

### PDA Provider Responsibilities

#### 1. Professional Ethics

- A. The PDA Provider shall attest to abide by the *NCCAOM® Code of Ethics*, the *NCCAOM® Grounds for Professional Discipline*, the *NCCAOM® Professional Development Activity (PDA) Department and Provider Agreement*, and the *NCCAOM® PDA Product and Service Disclaimer*.
- B. The PDA Provider shall comply with the highest ethical standards and all applicable laws and policies pertaining to accurate and truthful continuing education courses and documentation.
- C. PDA Providers who undergo state disciplinary actions must report the incident to the NCCAOM's PDA and Professional Ethics and Discipline Review (PEDR) Department within 30



days.

Note: Applicants who have had or are currently under disciplinary actions are not necessarily denied eligibility as an NCCAOM PDA Provider. The NCCAOM® Professional Ethics and Disciplinary Review (PEDR) Department will review the case and provide a status determination.

#### D. Complaint Process

A complaint received regarding a PDA Provider will follow the NCCAOM Requests and Appeals Procedure.

## 2. Advertisement

A. The PDA Provider shall take special care to advertise their programs truthfully and avoid misleading the public. PDA Providers are responsible for the content of the advertisements and must attest to adhere to ethical standards and compliance with the *NCCAOM® PDA Department and Provider Agreement*. The following constitutes misleading, deceptive, false or unethical advertising.

1. Misuse of the *NCCAOM® Logo*, the *NCCAOM® PDA Provider Badge* or the *NCCAOM® PDA Activity Logo*.
2. Misleading statement regarding the courses approved by the NCCAOM PDA Department including applications under PDA review.
3. Misleading claim regarding NCCAOM PDA Provider education or credentials.
4. Advertising that has the effect of intimidating or exerting undue pressure.
5. Advertising that uses unsubstantiated testimonials.
6. Advertising that creates an unjustified expectation or guarantees a cure.
7. Advertising that offers gratuitous services, products, or discounts, the purpose of which is to deceive the public.

B. PDA Providers may only advertise their connection as a PDA Provider with NCCAOM on currently active courses. The appropriate way to write a providership in advertising is "NCCAOM PDA Provider # xxx".

C. The PDA program conducts third-party reviews for continuing education coursework. The NCCAOM's PDA program does not approve or issue a 'certificate', 'certification' or



‘accreditation’ for continuing education programs and/or curricula. The Provider may not advertise that the course is an “NCCAOM PDA Certificate”, an “NCCAOM PDA Certification” or an “NCCAOM PDA Accredited” program.

- D. PDA Providers are required to include the PDA course code “PDA Course #: PDA-XX-XX on all publications for approved course(s).
- E. Providers who have submitted a course application that is currently under PDA review may state “Pending NCCAOM PDA Points” for advertisement purposes.
- F. Once the course is approved, the Provider may state the number of approved PDA points and utilize the *NCCAOM® PDA Activity Logo*.
- G. Approved non-profit organizations may request a flyer be distributed to NCCAOM Diplomates in their state and surrounding states to advertise the event.
- H. Providers may request the PDA Department for special or early use of the *NCCAOM® PDA Activity Logo*. The PDA Department will review individual cases and determine if the logo usage is appropriate.
- I. The NCCAOM retains the rights for all branding however the PDA Department does work with the PDA Provider to customize the *NCCAOM® PDA Certificate of Completion* by adding the Provider’s logo, responsible party’s signature and additional continuing education approvals.

### 3. Registration of Course Participants

- A. The PDA Provider is responsible for registering the participants of the sponsored event.
- B. The PDA Provider must charge the same registration fee for each participant. Registration fees that differ due to an increased charge for issuing the PDA points is not allowed.
- C. The PDA Provider may not charge an additional fee for issuing the PDA point(s) to the participant.
- D. All materials, supplies, etc. that are required to learn the course information must be provided to the participant and included in the registration fee.
- E. The PDA program does not participate in registering the course participants; however, the Provider’s website link is provided on the *NCCAOM® PDA Search Engine* and the *NCCAOM® Course Spotlight*.



#### 4. Documentation Requirements

- A. The PDA Provider recognizes and acknowledges that the NCCAOM is the owner of the NCCAOM's intellectual property.
- B. As the owner, the NCCAOM has the absolute right to control the branding, marketing, and licensing of its intellectual property. Any misuse by the Provider of the NCCAOM's intellectual property subjects the Provider to termination of their PDA Providership as well as potential disciplinary and/or legal action.
- C. The PDA Provider may not alter, combine, or change in any way the approved course title, content, length, or the *NCCAOM® PDA Certificate of Completion* without notifying the NCCAOM PDA Department in writing.
- D. All required documentation for each NCCAOM PDA approved course must be retained by the PDA Provider for a minimum of seven (7) years.
- E. A copy of each *NCCAOM® PDA Certificate of Completion* distributed prior to August 13, 2019 must be maintained by the Provider for a minimum of seven (7) years. *NCCAOM® PDA Certificate of Completions* distributed after August 13, 2019 will be saved to a master list on the Provider's PDA certificate platform.
- F. It is recommended that Providers maintain a computer back-up system for electronic files.

#### 5. Distribution of the PDA Points to the Participants

- A. PDA points are awarded to all attendees who complete the coursework. It is up to the receiving organization/profession if they will accept the PDA points for credit.
- B. The PDA Provider is required to issue the PDA points by the *NCCAOM® PDA Certificate of Completion*.
- C. Beginning September 23, 2019 all *NCCAOM® PDA Certificate of Completions* must be distributed via the Provider's Certificate platform within two weeks of the course completion.

#### 6. Assure Instructors are Qualified to Teach the Course

- A. Instructor qualifications include the following in the subject area being taught.
  - 1. Education
    - A. AOM Core Competencies – Master's degree or diploma in Oriental medicine,



acupuncture, and/or Chinese Herbology. Instructors who were approved prior to April 16, 2016 are exempt until the course expires at which time the policy will go into effect. Instructors from outside of the U.S. will be reviewed on a case-by-case basis.

- B. BIO, PE-CW - educational degree and/or educational background.
  - 2. Experience - a minimum of five years practical experience.
  - 3. Certification and/or Licensure - clear discipline record, if applicable.
  - 4. Teaching and/or Lecture Experience - recommended but not required.
- B. For the Responsible Party and course instructors in the United States, a professional resume or curriculum vitae outlining the above areas is the required documentation.
- C. For conferences or courses conducted by Asian practitioners from another country, a biographical sketch is acceptable for resume documentation.
- D. When a different instructor is contracted to teach an approved PDA course, the PDA Provider must notify the PDA Department and upload the instructor's resume/bio to the online course application for documentation purposes.

## 7. Co-Sponsored Events

When two or more NCCAOM PDA Providers co-promote a course, the event shall be sponsored by one Provider. The sponsoring Provider shall assume all the responsibilities outlined in this section.

## 8. State Regulatory Agencies

The NCCAOM recommends that the PDA Provider check with the acupuncture board or regulatory agency in the state they plan to offer instructional courses to assure they are aware of the continuing education requirements and/or limitations for instructors.

## 9. PDA Program Policies

- A. The PDA Provider shall agree to abide by the PDA Provider responsibilities and all applicable NCCAOM policies and procedures, evidenced by attesting to the *NCCAOM PDA Department and Provider Agreement* and the *NCCAOM PDA Product and Service Disclaimer*.
- B. The PDA Provider who is an NCCAOM Diplomate is required to maintain active status with



one/all of their NCCAOM Certifications. PDA Providers who are Diplomates at Lapsed status lose all PDA benefits (e.g., course applications and/or approvals, advertising, distributing PDA points, etc.) until they return to Active status in each certification. Active courses will be deactivated until full certification is retained.

- C. The PDA Provider agrees to maintain their online profile and update changes to the Provider information including their address, telephone number, email, website address and contact person. The Provider Name and Responsible Party fields in the online system are locked. The responsible party is the sole person who can request a change, in writing, by emailing the PDA Department at [pda@thenccaom.org](mailto:pda@thenccaom.org).

Note: A course in dry needling may be applied to the Core Competency AOM-AC category and accepted for NCCAOM recertification if the instructor is an NCCAOM Diplomate and/or licensed acupuncturist and the term “trigger point acupuncture/dry needling” is included in the course title.



## Steps to Become an NCCAOM PDA Provider

Sponsors of continuing education programs who become an NCCAOM PDA Provider enjoy a life-time membership with the PDA program. The approval process is a two to three week turn-around time. An expedited review is available at an additional cost determined by the NCCAOM.

### Step 1: NCCAOM PDA Provider Application

- Go to the NCCAOM website at [www.nccaom.org](http://www.nccaom.org)
- Look to the upper right corner and click on 'Log-in'. This will take you to the online portals for our constituents.
- Click on the 'PDA Provider Portal' (second box on the left).
- Select "Create Account" and follow the steps to create a new PDA Provider account.
- Complete the *NCCAOM PDA Provider Application*.
- Upload the Responsible Party's Professional resume or curriculum vitae.
- Review and agree with the PDA Attestation page covering the following documents:
  - ✓ *NCCAOM® Code of Ethics*
  - ✓ *NCCAOM® Grounds for Professional Discipline*
  - ✓ *NCCAOM® PDA Provider and Department Agreement*,
  - ✓ *NCCAOM® PDA Product and Service Disclaimer*
- Pay the one-time application fee as determined by the PDA Department. The fee is charged for the review of the NCCAOM PDA Provider application and is non-refundable.

### Step 2: Interview and Orientation

The PDA Department will review the applicant's application according to the PDA Provider Guidelines.

An interactive teleconference interview will be scheduled covering the following items.

- The applicant's journey in continuing education.
- NCCAOM PDA program overview.
- NCCAOM PDA Provider benefits.
- PDA policies overview.
- Guidance in filling out a course application and required documentation.

### Step 3: Welcome NCCAOM PDA Provider!

At the conclusion of the interview, and if both parties agree, the applicant will be brought on as an NCCAOM PDA Provider and issued a unique ID number. The new PDA Provider is then eligible to submit course applications for review.





## PDA Course Review and Approval

### NCCAOM® PDA Course Types and Required Documentation

#### Live Presentation

**Definition:** A course, workshop or seminar that is a face-to-face meeting between the participants and the instructor(s). Live presentation characteristics include two-way communication between all participants in theory subjects as well as acquiring psycho-motor skills through demonstration and supervised practice. The amount of time the participant is in attendance and is actively learning new information determines the number of PDA points to be issued for the course. The PDA Provider is responsible to monitor attendance that verifies compliance.

Note: A live course, webinar, conference, or overseas tour will not be published to the *NCCAOM® PDA Search Engine* until an event (presentation date and location) is posted in the online course application.

#### Characteristics

- Face-to-face interaction between instructor and participants
- Two-way communication
- A psycho-motor skill (e.g., needling, cupping) may be taught because the instructor can assess if the participant is correctly learning the skill.
- Teaching methods include, but are not limited to lecture, demonstration, group discussion, supervised practice, and question and answer sessions.
- Attendance is the qualifier for issuing NCCAOM PDA points.

#### Required Documentation

- *NCCAOM PDA Application: LIVE PRESENTATION*
- Instructor's professional resume or curriculum vitae
- Sample attendance record (template available)
- Sample program evaluation (template available)
- Sample advertisement (optional)

NOTE: A course in Trigger Point Acupuncture/Dry Needling may be applied to the Core Competency AOM-AC category and accepted for NCCAOM recertification if the instructor is an NCCAOM Diplomate and/or licensed acupuncturist and the term "trigger point acupuncture/dry needling" is included in the course title.



## Distance Learning Course

**Definition:** e-Learning is the computer and network-enabled transfer of knowledge and includes all forms of electronically supported learning and teaching. e-Learning programs are divided into two categories: 1) asynchronous where the student sets their own schedule (continuing education), and 2) synchronous where the instructor sets the course schedule (schools). Theory-based, didactic information is standard; psycho-motor skills, techniques, and demonstrations are not allowed because the instructor cannot assess if the student is acquiring the skill correctly, which directly addresses the NCCAOM's mission of public safety. The qualifier to determine the number of PDA points to issue is the amount of time it takes the student to complete the learning activities. Passing an end-of-course assessment is the document that records and verifies that learning was acquired.

### Characteristics

- Theory subjects only. Distance learning courses cannot teach a psycho-motor skill, technique, or demonstration (e.g., needling, cupping), because the instructor cannot visually assess if the student is performing the skill correctly.
- Learning activities include, but are not limited to reading, writing, listening (audio), research, and/or visual aids.
- Students complete and turn-in a worksheet prior to receiving the end-of-course assessment.
- The qualifier for issuing NCCAOM PDA points is successfully passing an end-of-course assessment (test).

### Required Documentation

- *NCCAOM® PDA Application: DISTANCE LEARNING*
- Instructor's professional resume or curriculum vitae
- Sample course evaluation
- Sample advertisement (optional)

**NOTE:** A live presentation or webinar that is also a distance learning course is considered two different programs due to the content, requirements, and documentation. Therefore, a live presentation that is also a distance learning course requires submission of separate *NCCAOM PDA Applications*; one for each course type.



## Conference or Symposium

**Definition:** A live, face-to-face event spanning several days. Characteristics include professional networking, break-out sessions or “tracks” (several presentations occurring at the same time), multiple speakers and varying topics. Attendance is a challenge to track and a second variable (recertification category) also requires monitoring. A *Participant Attendance Verification Form* is now required to address the two variables.

### Required Documentation

- *NCCAOM® PDA Application: CONFERENCE/SYMPOSIUM*
- Conference brochure showing presentation schedule, course descriptions and speaker biographical sketches (bios)
- Sample attendance record
- Sample Participant’s Attendance Verification Form
- Sample program evaluation
- Sample advertisement (optional)

## Overseas Tour

**Definition:** A group, sponsored by the PDA Provider, traveling to another country for an educational experience. Classroom sessions are documented in the course application and PDA points are awarded via the *NCCAOM® PDA Certificate of Completion*. PDA points are also available for clinical/hospital experiences of the tour under the Professional Development Activity section of the recertification requirements. Documentation includes a letter from the PDA Provider, on letterhead, outlining the dates, hours, and clinical areas.

### Required Documentation

- *NCCAOM® PDA Application: OVERSEAS TOUR*
- Instructor resume, or biographical sketch for foreign practitioners.
- Tour itinerary (template available)
- Sample attendance record
- Sample program evaluation
- Sample advertisement (optional)



## General NCCAOM PDA Course Policies

1. NCCAOM PDA points are awarded for active learning that is instructor led. PDA points are not awarded for breaks, lunch, dinner, homework, group presentations, tests, etc.
2. Products or services that are required to learn the course information must be made available to the participant free of charge. Vendors may sell products for purchase on a voluntary basis only.
3. If an active PDA course has a change in its title, content and/or length, a new PDA application must be submitted, and a new course number assigned.
4. PDA Points
  - A. One PDA point is equal to one hour or 60 minutes of active learning.
  - B. A PDA course must be at least one hour in length.
  - C. PDA points are not issued for breaks, lunch/dinner, homework, group presentations, or quizzes.
  - D. In the Content Outline, one PDA point can be divided into 15-minute increments (0.25; 0.50; 0.75; 1.0).
  - E. When determining the total number PDA points for a course, the points will be rounded down to the nearest 30 minutes (15.25 = 15.00; 15.75 = 15.50).
5. NCCAOM PDA Providers must use the *NCCAOM® PDA Certificate of Completion* to issue PDA points to all participants/students of a course.
6. A copy of each *NCCAOM® PDA Certificate of Completion* distributed prior to September 19, 2019 must be maintained by the Provider for a minimum of seven (7) years. *NCCAOM® PDA Certificate of Completions* distributed after September 19, 2019 will be saved to a master list on the Provider's online PDA certificate platform.



7. It is at the discretion of the PDA Department whether a course approval date may be back dated to an earlier time frame. A maximum of one month is allowed.
8. PDA Providers must provide the participants with the opportunity to give feedback about the course by way of an evaluation addressing, but not limited to the content, materials, and instructor(s) abilities. Participants are not required to complete the course evaluation and their name is an optional field.
9. A conference, symposium, or overseas tour is not eligible for renewal due to the change in course content, length and speakers.
10. A webinar is submitted via a live presentation application.  
Please note: A webinar contains elements from both a live presentation (attendance monitoring, two-way communication) and a distance learning course (no skill acquisition). Psychomotor skills, techniques and demonstrations are not allowed for webinars due to the instructor's inability to assess the participant's technique and the usually large number of attendees. A PDA worksheet and end of course assessment (test) is NOT required for webinars. Due to rapid technology innovation, special consideration may be reviewed by the *NCCAOM® PDA Advisory Panel* if the PDA Provider and instructor can demonstrate their abilities to address both items listed above.
11. To continue awarding PDA points and advertising on the *NCCAOM® PDA Search Engine*, Providers must apply to have a course renewed. It is the PDA Provider's responsibility to renew the course(s) before the expiration date. Providers will receive an automated email notice when a course is 90 days from expiration.
12. If a course is not renewed, it will automatically expire, and the PDA Provider must cease distributing PDA points and use of the *NCCAOM® PDA Activity Logo*. A new PDA application is required to have the course re-approved.



13. Required documentation for all program types must be retained for a minimum of seven (7) years. It is recommended that the PDA Providers have a computer back-up system for electronic files.
14. PDA Providers must distribute the *NCCAOM® PDA Certificate of Completion* including those needing corrections to all participants who were in full attendance within two (2) weeks of the conclusion of the course. It is up to the receiving organization if the PDA points will be accepted for relicensing and/or professional recertification. Partial attendance for emergencies and/or sickness will be reviewed by the PDA Department on a case-by-case basis.
15. The PDA Provider may not charge a monetary fee for issuing PDA Points.
16. A course in dry needling may be applied to the Core Competency AOM-AC category and accepted for NCCAOM recertification if the instructor is an NCCAOM Diplomate and/or licensed acupuncturist and the term “trigger point acupuncture/dry needling” is included in the course title.
17. A live presentation that is also a distance learning course is considered two different applications due to the content and documentation requirements for each program type. Therefore, a live presentation that is also a distance learning course requires submission of two separate applications; one for each program type.
18. PDA Providers are required to assure that the instructor’s course content is an accumulation of their research and/or experiences and written in their own words. All resources used in the content should be referenced in the course materials.
19. Assigning one recertification category per course is preferred. Multiple categories may be assigned at the discretion of the PDA Department.
20. It is preferred that Safety (SA) and Ethics (ET) courses be a stand-alone course. The PDA



staff will review requests for issuing Safety and/or Ethics points within a course on a case-by-case basis.

21. All courses must be a minimum of one hour/PDA point in length to be reviewed and approved by the PDA Department.
22. The PDA program conducts third-party reviews for continuing education course work. The NCCAOM's PDA program does not approve or issue a 'certificate', 'certification' or 'accreditation' for continuing education programs and/or curricula. The PDA Provider may not reference the above terminology in their advertisement(s).

### **PDA Policies for Live Presentations, Conferences, and Overseas Tours**

1. For live presentations, the PDA Provider may sponsor the event as many times as they wish, anywhere in the world within the one-year approval date range.
2. Conferences, symposiums and overseas tours are a one-time event and are not repeated due to changes in speakers and content.
3. A live course, webinar, conference, or overseas tour that does not have an event (presentation date and location) entered in the online course application will not be published to the *NCCAOM® PDA Search Engine*.
4. Attendance validates the number of PDA points awarded for a live presentation, webinar, conference/symposium, or an overseas tour.
  - a. The PDA Provider agrees to retain documentation of a participant's attendance by maintaining an attendance record for each course taught.
  - b. Participants must sign-in with a full signature once a day.
  - c. Electronic attendance programs may be used if attendance documentation is maintained by



the PDA Provider.

5. PDA points may not be carried over from one session to another meeting at a later date. For programs that meet over a period of time, each session is considered to be a stand-alone course. Each session/stand-alone course requires a PDA course number and distribution of the *NCCAOM® PDA Certificate of Completion*. The Provider may distribute an overall program certificate; however, the certificate must not display reference to NCCAOM or its trademarks
6. If a psychomotor skill, technique or demonstration is being taught, the Provider and instructor must assure an appropriate student-instructor ratio is maintained within the classroom.
7. PDA approved courses are for professional practitioners. Courses with participants that are professionals combined with non-professionals (e.g., lay people from the public) or actual patients are not eligible for PDA approval.
8. A course in dry needling may be applied to the Core Competency AOM-AC category and accepted for NCCAOM recertification if the instructor is an NCCAOM Diplomate and/or licensed acupuncturist and the term “trigger point acupuncture/dry needling” is included in the course title.
9. The following definitions will be used when reviewing a Qigong course for approval.
  - A. **Medical Qigong:**
    1. Definition: Medical qigong focuses on maintaining and restoring health, preventing and treating emotional, mental, and physical illness through external qigong therapy as supported in Traditional Chinese Medicine. It relies on the practitioner’s ability to direct qi with the mind, the hands, but without necessarily touching the patient’s body to correct the bio-energetic imbalance and blockage, and to strengthen and regulate the internal organs, the nervous system, the immune system, and to relieve pain and promote the healing process within human body.
    2. A medical qigong course will be approved in the Core Competency category of



- AOM-OM if it addresses the elements of Oriental Medicine Foundation and Theory as well as the application of skills into the participant's clinical practice.
3. Instructor qualifications include a diploma or Master's degree in acupuncture or Oriental medicine.

**B. Personal Qigong Exercise:**

1. Definition: A practice of gentle yet powerful movement for the practitioners to learn how to recharge their body, mind, and spirit. Practicing qigong exercise can enhance the practitioner's internal energy to cultivate greater emotional and physical strength, balance, alignment and vitality.
2. Personal Qigong Exercise courses will be approved in the Professional Enhancement section under course work (PE-CW).
3. Instructor qualifications include a training program in qigong exercise.

**PDA Policies for Distance Learning Courses**

1. Distance learning course applications will be approved for theory knowledge only. A psychomotor skill, technique or demonstration cannot be taught via a distance learning course.
2. The number of PDA points for a distance learning course is determined by the estimated amount of time it takes the student to learn the information and complete the course worksheet. distance learning courses that are over 20 hours/points will be reviewed on a case-by-case basis for dividing into separate courses.
3. The distance learning worksheet is a series of questions or a project that the student completes during the time of study.
  - A. The worksheet must be returned and reviewed by the Provider/instructor before the course assessment can be delivered to the student.
  - B. The worksheet does not need to be graded, however the Provider/instructor should review to assure the student has grasped the concepts of the goals and objectives of the course.



4. The PDA Provider delivers the course materials and the PDA worksheet to the student via paper, online, website, etc. The end-of-course assessment is not given to the student until all course work is completed and the worksheet has been verified by the Provider/instructor.
  
5. The student must successfully pass an end-of-course assessment validating they have acquired knowledge and attained the course goals and objectives.
  - A. The end-of-course assessment must be a minimum of 10 questions.
  - B. On the end-of-course assessment, the Provider determines the score required to successfully pass and the number of correct answers required.
  - C. The time it takes to do the assessment is not eligible for PDA points nor included in the PDA point total.



## NCCAOM PDA Course Review Procedure

1. The PDA Provider completes an online course application and uploads required documents. The following items are required for each course:
  - A. Course title, description, goals & objectives, and content outline (agenda).
  - B. Instructor resume
  - C. Supporting documentation
  - D. Attestation
  - E. Payment via PayPal
2. The PDA Department's approximate course review time frame is four (4) to six (6) weeks.
3. The application review fee is charged to the PDA Provider for reviewing the course materials. The review payment is made in U.S. dollars, is non-refundable and does not guarantee the course will be approved by NCCAOM.
4. An expedited course review is optional and available at an additional monetary charge set by the PDA Department. The expedited review will be completed within 15 business days from the receipt of the course application. An expedited review is for individual course applications and may not be applied to an annual discounted review package.
5. Providers will be notified by their online account when the application is submitted. Incomplete course applications will remain open to the PDA Provider to finish.
6. Upon receipt of the PDA application, the course is placed in the Department's review queue. During the course review, the PDA staff work closely with the PDA Provider to assure all documentation is accurate and meets PDA policy and continuing education standards.



7. The course is either approved or denied. PDA Providers are notified by email as to the outcome of the course review.
8. If denied, the PDA Department will notify the Provider, in writing, within 30 days of the denial and state the reason. The Provider has two (2) levels of appeal.
9. A PDA approved course is published on the *NCCAOM® PDA Search Engine* for a period of one year at no additional cost to the PDA Provider.

#### 10. Awarding PDA Points

- A. NCCAOM PDA Providers must use the *NCCAOM PDA Certificate of Completion* to distribute PDA points to the course participants.
- B. The NCCAOM retains the rights for all branding however, the PDA Department does work with the PDA Provider to customize the *NCCAOM® PDA Certificate of Completion* by adding the Provider's logo, responsible party's signature and additional continuing education approvals.
- C. When the course is completed, the Provider distributes the *NCCAOM® PDA Certificate of Completion* directly from their account on the NCCAOM website.
- D. A copy of each participant's *NCCAOM® PDA Certificate of Completion* is available on the Provider account on the NCCAOM website.

### **NCCAOM PDA Course Renewal Procedure**

A PDA approved course may be renewed enabling the Provider to continue awarding PDA points and further advertising on the *NCCAOM® PDA Search Engine* and/or the *NCCAOM® PDA Course Spotlight*.

1. The PDA Provider can renew a course online via their PDA Provider Home Page.
2. A conference, symposium, or overseas tour is not eligible for renewal due to the change in speakers, presentation content and length of the program.

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3. As a courtesy, the PDA Department will notify the PDA Provider 90 days prior to the program renewal date(s); however, it is the responsibility of the PDA Provider to assure the program renewal process is initiated.
  
4. If a course is not renewed, it expires and is automatically removed from the *NCCAOM® PDA Search Engine*. A new PDA application is required to have an expired course re-approved and published onto the *NCCAOM® PDA Search Engine* and/or the *NCCAOM® PDA Course Spotlight*.



## NCCAOM® PDA Department Responsibilities

1. Professional Ethics
  - A. The PDA Department shall comply with the highest ethical standards and all applicable laws pertaining to accurate and truthful continuing education course review and approval.
  - B. The PDA Department shall honorably assist and support PDA Providers who are sponsors of continuing education and professional development events for Diplomates applying for NCCAOM recertification in Oriental Medicine, Acupuncture, Chinese Herbology, and Asian Bodywork Therapy.
  
2. NCCAOM PDA Provider Approval
  - A. An NCCAOM PDA Provider Interview will be scheduled and conducted by the PDA Department for all new and reactivating NCCAOM PDA Provider applicants.
  - B. If the applicant meets the PDA Provider requirements and both parties agree, the PDA Department will approve the applicant as an “NCCAOM PDA Provider”.
  - C. The PDA Department will issue the NCCAOM PDA Provider a unique identification number to be used in all advertising, etc.
  - D. The PDA Provider is then eligible to submit course application(s) for review.
  
3. Continuing Education Course Reviews
  - A. The PDA Department shall provide a third-party review for all course applications to assure continuing education and NCCAOM recertification category requirements are met.
  - B. The review fee is paid when the course is submitted. An Annual Discounted Review (ADR) package is available to purchase bulk quantities of course reviews.
  - C. The PDA course application is placed in a ‘review queue’ in the date and time order they are submitted.
  - D. The PDA Department shall conduct the course review within 4 to 6 weeks of receipt of a completed NCCAOM PDA course application.
  - E. The PDA Department notifies the PDA Provider as to the outcome of the course review.
  - F. Upon approval, the PDA Department will issue each course a unique PDA course number.



G. An approved course allows the PDA Provider the ability to issue PDA points to participants via the *NCCAOM® PDA Certificate of Completion*, use of the *NCCAOM® PDA Activity Logo*, and placement of the course information in the *NCCAOM® PDA Search Engine*.

#### 4. PDA Program Discounts

A. A 50% discount will be provided to a PDA approved non-profit 501(c)3 organization for the following services:

1. Initial or reactivated NCCAOM PDA Provider Application, and
2. Individually submitted NCCAOM course applications.

B. State acupuncture associations will receive discounts for the following services:

1. 50% discount for an initial or reactivated NCCAOM PDA Provider Application,
2. 50% discount for NCCAOM individually submitted course applications,
3. NCCAOM voucher for the current recertification fee to use in a raffle or silent auction, and
4. Distribution of an NCCAOM flyer advertising the event to Active Diplomates in the state and surrounding states.

C. The PDA Department will provide a 10% discount to Providers who are NCCAOM Diplomates at Active status for the following services:

1. Initial or reactivated NCCAOM PDA Provider application,
2. individually submitted course applications, and
3. the *NCCAOM® PDA Course Spotlight*.

D. Discounts are not applicable to the Annual Discounted Review (ADR) package or expedited review fees.

#### 5. Advertisement Services

A. The PDA Department shall provide a method to advertise PDA approved course(s) to include:

1. *NCCAOM® PDA Provider Digital Badge*
2. *NCCAOM® PDA Activity Logo*
3. *NCCAOM® PDA Search Engine*
4. *NCCAOM® PDA Course Spotlight*



## 6. PDA Complaints

- A. The PDA Department oversees a system to monitor and assist in the resolution of complaints received according to NCCAOM Requests and Appeals Procedures.
- B. The PDA Department will also monitor the use of the NCCAOM's PDA trademarks, copyrights, confidential information and trade secrets ("intellectual property") and confirm such uses are authorized and within the scope of the *NCCAOM® PDA Department and Provider Agreement*.

## 7. PDA Appeal Process

The PDA Department shall have sole discretion to either approve or deny a PDA Provider and/or a continuing education course and the Provider's ability to award PDA points. The PDA Department offers a two-level appeal process for Provider applicants or course submitted.



## NCCAOM PDA Fee Schedule

### New PDA Provider Review

|                                     |        |
|-------------------------------------|--------|
| Initial NCCAOM® PDA Provider Review | \$ 350 |
| NCCAOM® PDA Provider Reactivation   | \$ 200 |

### PDA Course Reviews

#### Individual Course Review (Fee per course or renewal)

|                   |        |
|-------------------|--------|
| Live Presentation | \$ 250 |
| Distance Learning | \$ 250 |
| Conference        | \$ 400 |
| Overseas Tour     | \$ 400 |

#### Annual Discounted Review Packages (includes course renewals)

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| Up to 50 course applications per year  | \$ 750  |
| Up to 100 course applications per year | \$1,000 |
| Up to 200 course applications per year | \$1,500 |
| Up to 500 course applications per year | \$2,000 |

### PDA Optional Services

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| <i>NCCAOM® PDA Course Spotlight</i>              | \$ 500 per course, per posting |
| Expedited Review (Individual course review only) | \$ 250                         |

The PDA review fee pays for a professional, third-party review by a leader in the AOM continuing education field, use of the *NCCAOM® PDA Provider Digital Badge*, the *NCCAOM® PDA Activity Logo*, and posting the course on the *NCCAOM® PDA Search Engine* for a period of one year. The payment covers the act of evaluating the PDA providership and course documents. The review does not guarantee that the new provider applicant or course application will be approved by NCCAOM. The fee is payable to the NCCAOM in U.S. dollars and is non-refundable. The payment is made online via PayPal with a Visa, MasterCard, or American Express credit card. Checks are not accepted.



## NCCAOM Requests and Appeals

NCCAOM provides for a fair and equitable process to review and resolve a PDA request for information or complaint. A person may submit a request for information or file a complaint to NCCAOM if they believe there has been an error in a PDA decision; or if they have comments about specific aspects of the procedure.

### How to Submit a Request or Complaint

1. If a Provider or Diplomate believes there has been an error in a PDA program decision or has comments about specific aspects of the procedure, they may complete the *NCCAOM® PDA Request for Information or Complaint Form* available at <https://www.nccaom.org/education/provider-resources/> and email it to [pda@thnccaom.org](mailto:pda@thnccaom.org).
2. The person should be specific when outlining the request/complaint and be prepared to submit documentation, if requested.
3. Grievous complaints that jeopardize the safety of a patient, the public, or a course participant are forwarded to the Professional Ethics & Discipline Review Department for their review and potential investigation.
4. NCCAOM staff will research the request/complaint and, if necessary, seek counsel from senior management for a resolution that meets compliance with the PDA policies of NCCAOM.
5. NCCAOM staff will communicate the decision, in writing to the person within 30 days of the receipt of the request.

### How to Appeal an NCCAOM Decision

1. If the person is not satisfied with a decision made by the NCCAOM staff, they may appeal it, in writing, by mailing a letter to the NCCAOM offices or emailing the letter to [pda@thnccaom.org](mailto:pda@thnccaom.org).



2. The NCCAOM must receive the appeal letter within 30 days of the person's receipt of NCCAOM's initial decision. A rational justification is required for filing an appeal.
  
3. The person's appeal will be reviewed by the members of the NCCAOM Recertification Committee/PDA Advisory Panel at the next scheduled meeting. The person will be notified of the Committee's decision in writing, within 30 days of the meeting.



## NCCAOM® PDA Glossary

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| <b>Agenda (Content Outline)</b>         | Renamed the “Content Outline”, this portion of the <i>NCCAOM PDA Application</i> provides an overview of the program content, instructional time frames, NCCAOM recertification categories, and teaching methods/learning activities. The content outline verifies the number PDA points and recertification categories approved for the course. |
| <b>AOM</b>                              | Acupuncture and Oriental Medicine  |
| <b>AOM-OM</b>                           | Recertification Category: Acupuncture and Oriental Medicine: Oriental Medicine Foundation and Theory   |
| <b>AOM-AC</b>                           | Recertification Category: Acupuncture and Oriental Medicine: Acupuncture   |
| <b>AOM-CH</b>                           | Recertification Category: Acupuncture and Oriental Medicine: Chinese Herbology   |
| <b>AOM-ABT</b>                          | Recertification Category: Acupuncture and Oriental Medicine: Asian Bodywork Therapy  |
| <b>AOM-BIO</b>                          | Recertification Category: Acupuncture and Oriental Medicine: Biomedicine (Western Medicine)  |
| <b>SA</b>                               | Recertification Category: Acupuncture and Oriental Medicine: Safety  |
| <b>ET</b>                               | Recertification Category: Acupuncture and Oriental Medicine: Ethics  |
| <b>Attendance Record</b>                | A document that records the participant’s full signature for attendance documentation. The PDA Provider is responsible for assuring the participant attends the entire course.   |
| <b>Annual Discounted Review Package</b> | Multiple course reviews purchased on an annual basis.  |
| <b>Clinical Experience</b>              | A Professional Development Activity category for NCCAOM recertification. A clinical experience is a rotation through a licensed clinical facility that is part of a specific educational experience. The experience includes observation, case discussion, and supervised practice.  |



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| <p><b>Competent</b></p>  | <p>The standardized knowledge, skill, and ability (KSA) requirements for an individual to properly perform a professional job that meets standard guidelines and protects the public.</p>  |
| <p><b>Competency Maintenance</b></p>   | <p>Maintaining the knowledge, skills and abilities to perform a professional job. A section of the NCCAOM recertification requirements where Diplomate' s demonstrate 30 PDA points in core subjects by completing classroom or e-learning courses during a four-year recertification cycle.</p>   |
| <p><b>Conference</b></p>   | <p>A live, face-to-face event spanning several days. Characteristics include professional networking, break-out sessions or "tracks" (several presentations occur at the same time), multiple speakers and varying topics. Attendance is a challenge to track and a second variable (recertification category) also requires monitoring. A Participant Attendance Verification Form is now required to address the two variables.</p>  |
| <p><b>Contact Person</b></p>   | <p>The individual assisting with the continuing education course applications and monitoring for the PDA Provider. The contact person is the middle person between the Responsible Party and the PDA staff.</p>  |
| <p><b>Continuing Education</b></p>   | <p>A division of education that provides courses in continued competency training and professional development. The programs are non-credit courses that issue continuing education units (CEU's) to professionals typically for recertification and/or re-licensure.</p>  |
| <p><b>Continuing Education Unit (CEU)</b></p>  | <p>A continuing education unit (CEU) is an hourly measure that provides evidence of completion of continuing education requirements mandated by certification bodies, professional societies, or governmental licensing boards. A CEU is defined by NCCAOM as an hour of participation in a recognized continuing education course, with qualified instruction and sponsorship. CEU records also provide employers with information on training pertinent to specific occupations.</p> |
| <p><b>Core Acupuncture &amp; Oriental Medicine - Knowledge, Skills, and Abilities (CO)</b></p> | <p>A Section of NCCAOM recertification requirements. Thirty PDA points are the minimum requirement in core skills in a four-year recertification cycle. The core Knowledge, skills and abilities (KSAs) are outlined in the <i>NCCAOM® Examination Study Guides</i> for each certification area.</p>   |
| <p><b>Course</b></p>   | <p>A course covers one subject and is presented by an instructor or multiple instructors via a live presentation or online coursework.</p>   |



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| <b>CPR</b>                             | Cardiopulmonary Resuscitation (CPR) is an emergency life-maintenance procedure to provide basic care to a client, student, or co-worker until emergency medical professionals can arrive. Documentation of a CPR card/certificate is required by all Diplomates within their four-year recertification cycle.   |
| <b>Dipl. Ac. (NCCAOM)<sup>®</sup></b>  | An individual certified by NCCAOM in Acupuncture.   |
| <b>Dipl. C.H. (NCCAOM)<sup>®</sup></b> | An individual certified by NCCAOM in Chinese Herbology.   |
| <b>Dipl. O.M. (NCCAOM)<sup>®</sup></b> | An individual certified in Oriental Medicine (Ac and CH).   |
| <b>Dipl. ABT (NCCAOM)<sup>®</sup></b>  | An individual certified in Asian Bodywork Therapy.  |
| <b>Distance Learning Coursework</b>    | eLearning is the computer and network-enabled transfer of knowledge and includes all forms of electronically supported learning and teaching. Online learning is divided into two categories: 1) asynchronous distance learning, and 2) synchronous online learning. Theory-based or didactic information is standard; psycho-motor skills and techniques are not taught because the instructor cannot assess if the student is acquiring the skill correctly, which directly addresses the NCCAOM's mission of public safety. The qualifier to determine the number of PDA points to issue is the amount of time it takes the student to complete the learning activities. Passing an end-of-course assessment is the document that records and verifies compliance. |
| <b>End-of-Course Assessment</b>        | A test that is given to the student participating in a distance learning course. A minimum of 10 questions and identification of a passing grade is required.   |
| <b>Ethics (ET)</b>                     | An NCCAOM recertification category identifying that 2 PDA points in Ethics coursework is required during a four-year recertification cycle.   |
| <b>Expedited Course Review</b>         | A course review completed within 15 business days of receipt of the expedited payment. The expedited review is an optional service provided at an additional fee. Expedited reviews apply to individually submitted course applications only; they are not accepted for the Annual Discount Review packages.  |
| <b>Instructor</b>                      | An individual who is qualified to teach a continuing education course.  |



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| KSA's   | The Knowledge, Skills, and Abilities (KSA) required to complete a task. For more information, see the <i>NCCAOM® Examination Study Guides</i> at the NCCAOM website at <a href="http://www.nccaom.org">www.nccaom.org</a> .   |
| Learning Activity   | An activity that the student performs to learn the content of a distance learning course. Examples include reading, writing, auditory and visual materials.   |
| Live Presentation   | A course, workshop, seminar, or webinar that is a face-to-face meeting between the participants and the instructor(s). Two-way communication between all participants in theory subjects as well as acquiring psychomotor skills through demonstration and supervised practice. The qualifier to determine the number of PDA points to issue is the amount of time the participant is in attendance and is actively learning new information. The attendance record (sign-in or sign-out sheet) is the document that records and verifies compliance. |
| NCCAOM®   | National Certification Commission for Acupuncture and Oriental Medicine   |
| <i>NCCAOM® PDA Certificate of Completion</i>  | The official <i>NCCAOM® PDA Certificate of Completion</i> distributed by the PDA Provider to participants completing an approved course.  |
| <i>NCCAOM® Code of Ethics</i>   | The Code of Ethics is the cornerstone of the NCCAOM's commitment to ethical business practices and professional conduct. Every NCCAOM Diplomate and applicant pledges to abide by the <i>NCCAOM® Code of Ethics</i> standards and procedures as a condition of NCCAOM certification and certification maintenance.  |
| <i>NCCAOM® Grounds for Professional Discipline</i>  | A non-exhaustive list of common types of actions that will subject NCCAOM applicants and Diplomates to disciplinary actions including but not limited to unethical behavior, legal and disciplinary matters, incompetence, impairment, and exam irregularity.   |
| NCCAOM Logo<br>              | May <u>NOT</u> be used for advertising  |
| <i>NCCAOM® PDA Department and Provider Agreement</i>  | An agreement between NCCAOM's PDA Department and a PDA Provider attesting they will abide by the duties and responsibilities as outlined in the <i>NCCAOM® PDA Handbook</i> .   |
| NCCAOM PDA Activity Logo<br> | A registered logo of the NCCAOM's PDA Department. The logo is available to PDA Providers to <u>use in advertising their approved course(s)</u> .  |



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| <p>NCCAOM PDA Provider Digital Badge</p>  | <p>An electronic icon, or digital badge which, when clicked on, showcases the PDA Provider, courses and other information about their continuing education efforts. Digital badges may be used on a website, resume, email, etc.</p>  |
| <p><i>NCCAOM® PDA Product and Service Disclaimer</i></p>   | <p>A document signed by the PDA Provider that they have not created or presented the continuing education program for the purposes of promoting a service or selling a product.</p>   |
| <p><i>NCCAOM® PDA Renewal Application</i></p>  | <p>The application used to renew courses that is available on the NCCAOM PDA Provider platform.</p>   |
| <p><i>NCCAOM® PDA Course Applications</i></p>  | <p>Four types of PDA applications: 1) Live Presentation, 2) Distance Learning, 3) Conference, and 4) Overseas Tour. PDA applications are available on the NCCAOM PDA Provider platform.</p>   |
| <p>NCCAOM PDA Provider</p>   | <p>A sponsor of a continuing education event approved by the NCCAOM. The approval allows the sponsor to issue PDA points to the participants via the <i>NCCAOM® PDA Certificate of Completion</i>.</p>  |
| <p><i>NCCAOM® PDA Provider Application</i></p>   | <p>The application, supporting documents, and review fee submitted to the PDA Department requesting an individual or organization be reviewed for approval by the NCCAOM. The application is available on the NCCAOM website.</p>   |
| <p>NCCAOM Mission Statement</p>  | <p>To assure the safety and well-being of the public and advance the professional practice of acupuncture and Oriental medicine by establishing and promoting national evidence-based standards of competence and credentialing.</p>  |
| <p>NCCAOM® PDA Search Engine</p>   | <p>A database located on the NCCAOM's website that houses the PDA approved continuing education programs. The <i>NCCAOM® PDA Search Engine</i> is accessed by NCCAOM Diplomates, state regulatory agencies, and the public to obtain information about approved programs.</p>   |
| <p>NCCAOM Recertification</p>  | <p>Maintaining core competencies and professional development in acupuncture and Oriental medicine. Diplomates are responsible for maintaining their professional competencies by renewing their NCCAOM certification every four years. A minimum of 60 PDA points and CPR education are required in a four-year recertification cycle.</p> |
| <p>NCCAOM Recertification Categories</p>   | <p>Groupings of categories required for NCCAOM recertification. The groupings may be required or elective and are search fields on the <i>NCCAOM® PDA Search Engine</i>.</p>  |



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| NCCAOM Vision Statement                  | Acupuncture and Oriental medicine provided by NCCAOM credentialed practitioners will be integral to healthcare and accessible to all members of the public.   |
| NCCAOM Website                           | <a href="http://www.nccaom.org">www.nccaom.org</a>  |
| Overseas Tour                            | A group, sponsored by the PDA Provider, traveling to another country for an educational experience. Classroom sessions are documented in the PDA course application and PDA points are awarded via the <i>NCCAOM® PDA Certificate of Completion</i> . PDA points are also available for the clinical/hospital experience portion of the tour under the Professional Development Activity section of the recertification requirements. Documentation includes a letter from the PDA Provider, on letterhead, outlining the dates, hours, and clinical areas. |
| Participant Attendance Verification Form | A form used for conferences that tracks a participant’s attendance, PDA points and recertification categories. Signing-in is still required – the form aggregates the attendance and recertification categories for the PDA Provider.   |
| PDA                                      | Professional Development Activity   |
| PDA Appeal Process                       | A formal procedure by which the PDA Provider may challenge the decision of their Providership or approval of a program under review.  |
| PDA Complaint Process                    | A formal procedure by which a person may submit a complaint against a PDA Provider, instructor, or course. The <i>NCCAOM® PDA Complaint Form</i> must be completed and emailed to the PDA Department. Staff will investigate and follow-up for resolutions with the individuals.  |
| PDA Department                           | The department responsible for overseeing NCCAOM’s professional development activities.   |
| PDA Denial Letter                        | A formal, written notification from the PDA Department to the applicant that a PDA Provider or course review application has been denied. The notification includes a reason for the denial and the availability of an appeal process.  |
| PDA Home Page                            | The PDA portion of the NCCAOM website at <a href="http://www.nccaom.org">www.nccaom.org</a> .   |
| PDA Provider Home Page                   | The PDA Provider’s home page on their online account. Provider information and course(s) status and monitoring are available to the Responsible Party and Contact Person.   |



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| PDA Provider Status      | <p>A – Active                      currently has approved PDA programs<br/>         I – Inactive                    currently does not have approved PDA programs<br/>         E – Expired                    has not had approved PDA programs for 4+ years<br/>         DR                                under Disciplinary Review<br/>         R- Revoked                    NCCAOM PDA Providership terminated</p> |
| PDA Point                | A continuing education unit defined by NCCAOM as a Professional Development Activity (PDA) point. One PDA point equals one hour of active learning/instruction.   |
| PE-CW                    | Recertification Category: Professional Enhancement coursework   |
| PE-AT                    | Recertification Category: Professional Enhancement activity   |
| PEDR                     | NCCAOM’s Professional Ethics and Discipline Review  |
| Professional Enhancement | A Section of the NCCAOM recertification process for complementary and integrative therapy coursework and professional development activities.   |
| Program Evaluation       | A survey completed by students that gives feedback to the PDA Provider and course instructor regarding the educational experience. A template is available on the PDA Home page at <a href="http://www.nccaom.org">www.nccaom.org</a> .   |
| Program Worksheet        | Assignment given to a student of a distance learning course during their time of study. The program worksheet is not graded, completed by the student and returned to the instructor prior to receiving the end-of-course assessment. Provides a learning tool for the student and documentation that the course work was completed for the instructor.   |
| Responsible Party        | The person held accountable for the PDA Providership to assure all responsibilities and policies are met according to the <i>NCCAOM® Code of Ethics, NCCAOM® Grounds for Professional Discipline, NCCAOM® PDA Handbook, NCCAOM® PDA Department &amp; Provider Agreement, and the NCCAOM® PDA Product and Service Disclaimer.</i>  |
| Safety (SA)              | An NCCAOM recertification category identifying the 2 PDA points required in safety education earned during a four-year recertification cycle.   |
| Seminar                  | A multiple-day live presentation that covers one subject. A seminar may be presented by one or two instructors for multiple days.   |



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| <p><b>State Re-licensure</b></p>   | <p>In all states except AL, KS, OK, ND, SD, WY, acupuncturists are required to renew their state acupuncture license in order to continue practicing in the AOM profession. Acupuncture re-license requirements differ from state to state.</p> |
| <p><b>Symposium</b></p>            | <p>See Conference</p>   |
| <p><b>Teaching Methodology</b></p> | <p>The instructor’s method used to transfer knowledge to the participant during an educational program. Examples include lecture, demonstration, group discussion, and supervised practice.</p>   |

**Notes**