



# NORTH AMERICAN HOMEOPATHY EXAMINERS

The Homeopathy Practitioner Licensing Exam (HPLEX) was developed by a committee of Subject Matter Experts (SMEs) in the field of homeopathic medicine, and in line with the [\*Educational Standards and Practice Competencies for the Professional Practitioner of Homeopathy in North America\*](#), a document which guides accredited homeopathy schools in preparing homeopaths for professional practice. The HPLEX exam committee has identified the following tasks, skills, and knowledge necessary for Professional Homeopaths to practice with competence and safety.

## **Section 1: History, Theory, Philosophy, and Methodology**

### **History & Development of Homeopathy**

- HD-01 Cite the development of classical homeopathy and the social cultural and historical forces that have influenced its practice over its 225-year history.
- HD-02 Identify the philosophers and authors who have had major influences on homeopathic thought and be able to place them in context.

### **Principles, Theory, Philosophy and Methodology of Homeopathy**

- TP-01 Describe the principles of and mechanisms behind homeopathy that guide its theories and implementation in clinical practice.
- TP-02 Identify that the principles, theory, philosophy and methods of homeopathy are based on foundations that are over 225 years old.
- TP-03 Recognize the principles, dynamics, and nature of health and disease from the perspective of a homeopath.
- TP-04 Explain the ways homeopathic view differs from allopathic view, and other views of health and disease, both current and historical.
- TP-05 Explain the theories, principles, and methods put forth by Hahnemann and other respected homeopaths in their various writings including:
  - a. Requirements of the homeopathic practitioner, as enumerated in Aphorism # 3 of The Organon

- b. Principles of Cure, as taught by Hahnemann
- c. Understanding disease
- d. Taking the case
- e. Acquiring knowledge of remedies
- f. Homeopathic management of disease (on all levels)
- g. Intermittent diseases
- h. Case management (both theoretical and practical)
- i. Differences among the concepts of homeopathy, isopathy and allopathy
- j. Primary and secondary actions of homeopathic and allopathic medicines
- k. The action of potentized remedies
- l. Preparation/manufacture of homeopathic remedies
- m. Different potency scales, including: X, C, D, K, LM, and Q
- n. Administration of homeopathic remedies and the forms in which they can be given (i.e. liquid, powder, tablet, globules, inhalation, or others)
- o. Possible responses to remedies

TP-06 Recognize the direction of case progress and related aspects of principles, theory, philosophy and methods of homeopathy as enumerated by authors recognized by the global homeopathic community.

## **Pharmacy**

PH-01 Explain the role of the Homeopathic Pharmacopoeia Convention of the United States (HPCUS) in publishing the Homeopathic Pharmacopoeia of the United States (HPUS) which sets standards for the manufacture of homeopathic remedies

PH-02 Explain the aspects of remedy manufacturing, including:

- a. the difference between a manufacturing and dispensing pharmacy
- b. the sources of all remedies
- c. the process by which remedies are made into mother tinctures according to the different directives in the Organon and in the Chronic Diseases
- d. the changes in pharmacy as a consequence of different editions of the Organon
- e. the traditions of homeopathy versus the modern commercial realities of remedy manufacture (photo chromatography)

PH-03 Explain the aspects of remedy dispensing, including:

- a. methods of administering remedies to clients
- b. the scales of dynamization - starting with mother tincture
- c. the different scales used - decimal, centesimal, 50 millesimal
- d. the different methods of preparation – multiple vial Hahnemann, single vial Korsakoff
- e. the model of potentization through succussion
- f. the application of the concepts of dilution and succussion in the choice of homeopathic remedy potency and dosage as it pertains to the sensitivity of the individual and to his or her vital force

## **Section 2: Taking, Analyzing, and Managing Cases**

### **Materia Medica**

MM-01 Define the various sources of materia medica, including primary, secondary, and tertiary sources.

MM-02 Differentiate between the curative action of one remedy and another seemingly similar remedy

MM-03 Explain the importance of comparative and differential study of remedies

MM-04 Define and give examples of local symptoms, concomitant symptoms, and modalities

MM-05 Define and give examples of proving symptoms, generalities, mental/emotional symptoms, and sensation symptoms

MM-06 Define and give examples of characteristic symptoms, keynote and confirmatory symptoms, and SRP (strange, rare, peculiar symptoms)

MM-07 Define and give examples of clinical symptoms/pathology, and organ/system affinities

MM-08 Explain miasmatic relationships among remedies

MM-09 Define and give examples of remedy relationships and relationships of substances

MM-10 Name commonly used remedies for acute / first aid cases

MM-11 Define and give examples for polychrest remedies and so-called "small remedies"

MM-12 Define and give examples for nosodes and sarcodes

MM-13 Define and give examples of isopathic, tautopathic, and gemmotherapeutic remedies

MM-14 Define and give examples for tissue salts, flower essences and imponderable remedies

- MM-15 Identify remedies that are antidotes, inimicals, complementaries, and that follow well
- MM-16 Use repertory comparisons
- MM-17 Recognize the progressive stages of pathology of remedies
- MM-18 List remedy indications for different stages of human development
- MM-19 Identify the keynote, primary indicators and affinities for *Aconitum napellus*, *Aethusa*, *Agaricus*, *Allium cepa*, *Aloe socotrina*
- MM-20 Identify the keynote, primary indicators and affinities for *Aluminum oxydata*, *Anacardium orientale*, *Antimonium crudum*, *Antimonium tartaricum*, *Apis*
- MM-21 Identify the keynote, primary indicators and affinities for *Argentum metallicum*, *Argentum nitricum*, *Arnica*, *Arsenicum album*, *Arsenicum iodatum*
- MM-22 Identify the keynote, primary indicators and affinities for *Asafoetida*, *Asarum europaeum*, *Aurum metallicum*, *Badiaga*, *Baptisia*
- MM-23 Identify the keynote, primary indicators and affinities for *Baryta carbonica*, *Belladonna*, *Bellis perennis*, *Berberis*, *Borax*
- MM-24 Identify the keynote, primary indicators and affinities for *Bromium*, *Bryonia*, *Cactus*, *Calcarea carbonica*, *Calcarea fluorica*
- MM-25 Identify the keynote, primary indicators and affinities for *Calcarea phosphorica*, *Calcarea sulphurica*, *Calendula*, *Camphora*, *Cannabis indica*
- MM-26 Identify the keynote, primary indicators and affinities for *Cantharis*, *Capsicum*, *Carbo animalis*, *Carbo vegetabilis*, *Carcinosin*
- MM-27 Identify the keynote, primary indicators and affinities for *Caulophyllum*, *Causticum*, *Chamomilla*, *Chelidonium*, *China officinalis*
- MM-28 Identify the keynote, primary indicators and affinities for *Cicuta*, *Cimicifuga*, *Cocculus*, *Coccus cacti*, *Coffea*
- MM-29 Identify the keynote, primary indicators and affinities for *Colchicum*, *Colocynthis*, *Conium*, *Crocus sativus*, *Crotalus horridus*
- MM-30 Identify the keynote, primary indicators and affinities for *Cuprum metallicum*, *Cyclamen*, *Digitalis*, *Drosera*, *Dulcamara*
- MM-31 Identify the keynote, primary indicators and affinities for *Elaps*, *Equisetum*, *Eupatorium perfoliatum*, *Euphrasia*, *Ferrum metallicum*

- MM-32 Identify the keynotes, primary indicators and affinities for Ferrum phosphoricum, Fluoricum acidum, Gambogia, Gelsemium, Glonoinum
- MM-33 Identify the keynotes, primary indicators and affinities for Graphites, Hamamelis, Helleborus, Hepar sulphuris, Hyoscyamus
- MM-34 Identify the keynotes, primary indicators and affinities for Hypericum, Ignatia, Iodum, Ipecacuanha, Iris versicolor
- MM-35 Identify the keynotes, primary indicators and affinities for Kali bichromicum, Kali bromatum, Kali carbonicum, Kali phosphoricum, Kali sulphuricum
- MM-36 Identify the keynotes, primary indicators and affinities for Kreosotum, Lac caninum, Lachesis, Latrodectus mactans, Laurocerasus
- MM-37 Identify the keynotes, primary indicators and affinities for Ledum, Lilium tigrinum, Lobelia inflata, Lycopodium, Lyssin
- MM-38 Identify the keynotes, primary indicators and affinities for Magnesia carbonica, Magnesia muriatica, Magnesia phosphorica, Mancinella, Medorrhinum
- MM-39 Identify the keynotes, primary indicators and affinities for Mercurius solubilis, Mercurius corrosivus, Mercurius iodatus flavus, Mercurius iodatus ruber, Mezereum
- MM-40 Identify the keynotes, primary indicators and affinities for Naja, Natrum arsenicum, Natrum carbonicum, Natrum muriaticum, Natrum phosphoricum
- MM-41 Identify the keynotes, primary indicators and affinities for Natrum sulphuricum, Nitricum acidum, Nux moschata, Nux vomica, Opium
- MM-42 Identify the keynotes, primary indicators and affinities for Palladium metallicum, Petroleum, Phosphoricum acidum, Phosphorus, Phytolacca
- MM-43 Identify the keynotes, primary indicators and affinities for Platina metallicum, Plumbum metallicum, Podophyllum, Psorinum, Pulsatilla nigricans
- MM-44 Identify the keynotes, primary indicators and affinities for Pyrogenium, Ranunculus bulbosa, Rhus toxicodendron, Rumex crispus, Ruta graveolens
- MM-45 Identify the keynotes, primary indicators and affinities for Sabadilla, Sabina, Sambucus nigra, Sanguinaria, Sarsaparilla
- MM-46 Identify the keynotes, primary indicators and affinities for Sepia, Silica, Spigelia, Spongia tosta, Stannum metallicum
- MM-47 Identify the keynotes, primary indicators and affinities for Staphysagria, Stramonium, Sulphur, Sulphuricum acidum, Symphytum

- MM-48 Identify the keynotes, primary indicators and affinities for Syphilinum, Tabacum, Tarentula cubensis, Tarentula hispanica, Thuja
- MM-49 Identify the keynotes, primary indicators and affinities for Tuberculinum, Urtica urens, Veratrum album, Viburnum, Zincum metallicum

## **Repertory**

- RP-01 State the purpose of the repertory, its historical development, and the source of its content
- RP-02 Identify the repertory's organizational structure, and strengths and limitations of the various repertories in use.
- RP-03 Define terminology and abbreviations used in the repertories, including contemporary and anachronistic medical terminology
- RP-04 Interpret the language of a repertory (or the materia medica)—within its historical and social context— and translates it into contemporary language and meaning
- RP-05 Explain symbols, references, and remedy grades in the various repertories
- RP-06 Choose appropriate rubrics for General symptoms
- RP-07 Choose appropriate rubrics for Mind symptoms
- RP-08 Choose appropriate rubrics for Vertigo and Head symptoms
- RP-09 Choose appropriate rubrics for Face, Teeth and Mouth symptoms
- RP-10 Choose appropriate rubrics for Eye, Ear and Nose symptoms
- RP-11 Choose appropriate rubrics for Vision and Hearing symptoms
- RP-12 Choose appropriate rubrics for Neck, External Throat and Throat symptoms
- RP-13 Choose appropriate rubrics for Back, Chest and Larynx/Trachea symptoms
- RP-14 Choose appropriate rubrics for Bladder, Urethra and Urine symptoms
- RP-15 Choose appropriate rubrics for Urinary Organs, Kidneys and Prostate symptoms
- RP-16 Choose appropriate rubrics for Male Genital/Sex, Female Genital/Sex and Male and Female Genital/Sex symptoms
- RP-17 Choose appropriate rubrics for Respiration, Cough and Expectorations symptoms
- RP-18 Choose appropriate rubrics for Chill, Fever and Perspiration symptoms

- RP-19 Choose appropriate rubrics for Sleep and Dream symptoms
- RP-20 Choose appropriate rubrics for Abdomen and Stomach symptoms
- RP-21 Choose appropriate rubrics for Rectum and Stool symptoms
- RP-22 Choose appropriate rubrics for Extremities and Skin symptoms

## **Case Taking**

- CT-01 Identify the suitability of the case to homeopathic care.
- CT-02 Establish a confidential, efficient, non-judgmental, accurate, and complete manner of case taking in a professional setting.
- CT-03 Listen, elicit and record information in sufficient detail that will lead to the successful analysis of each individual client's case
- CT-04 Gather Social Determinants of Health (SDOH) information to assist in understanding the etiology, maintaining causes and obstacles to cure. Questions should explore client access to:
  - a. Healthy, affordable food from a conveniently located grocery store
  - b. Safe and healthy housing and neighborhood
  - c. Safe and healthy employment/ work environment with adequate income
  - d. Accurate health information and health literacy
  - e. Transportation to facilitate meeting day to day needs
  - f. Social support
  - g. Freedom from all forms of oppression and the ability to express themselves to their highest purpose
- CT-05 Explore the client's etiology, maintaining cause and obstacles to cure by including questions seeking to understand how current and past trauma may be impacting health and well-being of the client.
- CT-06 Employ the principles of trauma-informed care to create a safe, therapeutic relationship with clients and to avoid re-traumatization in the context of care. This includes integrating the following principles into interactions with clients:
  - a. Taking steps to establish safety;
  - b. Demonstrating trustworthiness;
  - c. Working in a collaborative manner;
  - d. Focusing on client empowerment;

- e. Moving past cultural stereotypes and biases, leveraging the healing value of traditional cultural connections, and recognizing and addressing historical trauma;
- f. Not insisting that any particular event, emotion, or response to a potential past trauma be divulged in any given therapeutic session, or ever;

Avoid having clients repeatedly tell their experiences of traumatic events(s).

CT-07 Recognize obstacles to cure, including:

- i. The relationship between the physical, social, emotional, and economic contexts in which people live and their health and well-being, understanding those that are within the client's control, and those that may be attributed to opportunity, inequity, and social and environmental injustice.
- ii. The implications for health and disease of personal and family health history, life events and environmental factors.
- iii. The potential effect of lifestyle (for example, diet, smoking, alcohol consumption, poor sleep, sedentary indoor living, etc.) on an individual's health and social well-being.
- iv. The resources available to individuals to make changes in their circumstances and lifestyles.
- v. How personal beliefs and preferences affect individuals' lives and the choices they make, the context in which they live and their health and well-being.

CT-08 Recognize how medical, chemical and recreational drugs and alcohol can sometimes result in masking, suppressing and/or alteration of individualizing characteristic symptoms of the original disease symptoms

CT-09 Employ effective and sensitive interviewing attitudes and techniques that will enable individuals to reveal and talk through relevant issues in their physical, mental and emotional health.

## Case Analysis

CA-01 Conduct a comprehensive analysis including: analyzing gathered data, identifying essential features of the case and their relationships, assessing the relative value of all the information, and determining what information, if any, is missing that is needed for a complete homeopathic analysis.

CA-02 Analyze what needs to be addressed in a case, including; identifying the central disturbance or center of gravity and themes of the case; identifying what is distinguishing and characteristic within the "totality of symptoms" in the mental, emotional and physical spheres combined. Determine and records the effect on the case analysis of any information that is judged to be missing, incomplete, or contradictory.

CA-03 Prioritize symptoms and explain the hierarchy of symptoms according to homeopathic principles.

CA-04 Assess previous and current therapeutic history/treatment, including homeopathy, allopathy, and other therapeutic modalities.

CA-05 Evaluate the vitality and health of the person (in homeopathic terms, the "vital force").



- CA-06 Evaluate the client's personal and family history, miasmatic history, evidence of intergenerational trauma, susceptibility, suppression, organ affinities and systemic effects.
- CA-07 Explore how broad, social factors may impact outcomes and exist as maintaining causes.
- CA-08 Gather and use information on modalities (such as: time of day, side of the body, and aggravation or amelioration) that are striking for a particular individual.
- CA-09 Explore as part of case analysis the circumstances and timing of the onset of symptoms, causation and etiology, and duration and intensity/severity of symptoms.
- CA-10 Identify and isolate “concomitant” symptoms that may have been present at the same time but are due to separate (usually transitory or extraneous) causes.
- CA-11 Differentiate between strange, rare, and peculiar symptoms, characteristic and common symptoms. In distinguishing common from characteristic (individualizing) symptoms, consider the client’s apparent pathology based on allopathic diagnosis and recognize symptoms common to that pathology.
- CA-12 Evaluate the effect of any etiological, exciting, or maintaining causes, as well as any underlying susceptibilities. Maintain awareness of the impact of trauma, and social determinants of health that may be compounding maintaining causes or obstacles to cure.
- CA-13 Maintain awareness of the diversity of case analysis strategies.
- CA-14 Document, identify and evaluate obstacles such as antidoting, environmental interference, and iatrogenic influences. Identify possible means to overcome identified obstacles and discuss options with the client.
- CA-15 Explore where additional support and services may be needed to help mitigate the impacts of lack of access to social determinants of health and make culturally and socially appropriate referrals.
- CA-16 Identify a reasonable prognosis and appropriate case management strategy, and where appropriate determine both short-range and long-range goals.

## **Case Management**

- CM-01 Observe the response to the remedy and take the correct action
- CM-02 Conduct meaningful follow-up sessions. including:
  - a. Assessing the multifaceted action of a remedy.
  - b. Identifying and managing any remedy aggravations.
  - c. Evaluating the possible antidoting of a remedy.
  - d. Identifying any return of symptoms.

- e. Identifying any new symptoms.
- f. Identifying any proving symptoms.
- g. Evaluating palliation or suppression.
- h. Assessing the susceptibility of the client.
- i. Assessing obstacles to cure, as taught by Hahnemann.
- j. Employing intercurrent remedies, when indicated.
- k. Determining when to make a second remedy choice and how to select it.

CM-03 Manage the practitioner-client relationship including:

- a. The typical course of events during homeopathic care
- b. The problems posed by the use of self-prescribed remedies, as well as by other changes that may make interpretation of the client's progress more difficult.
- c. The practitioner's ethical obligations, including confidentiality.
- d. Client informed consent

CM-04 Maintain record keeping with HIPPA compliant methods for paper, online, cloud, and computer records

CM-05 Apply knowledge of a hierarchy of change within a healing process

CM-06 Provide appropriate communication to clients both during and between follow-ups

## **Posology**

PO-01 Select a remedy potency, dosage, and method of administration best suited to each case, including consideration of the client's vitality and age, and the onset, duration and intensity/severity of symptoms.

PO-02 Explain the appropriate potency and dosage for each case, evaluate the progress of the case accordingly, and alter the potency and dosage if appropriate.

PO-03 Cite the methods of administration of a remedy according to the different additions of the Organon, including dry dose, wet dose, split dose, topical, olfaction, and suppository.

PO-04 Explain remedy potency and frequency of administration in acute versus chronic cases, and acute cases arising in the course of chronic.

## **Health Sciences and Interactions Within the Healthcare System**

HS-01 Cite the signs and symptoms of common diseases encountered in the practitioner's practice with an emphasis on assessing the depth of mistunement present in the case.

- HS-02 Recognize the difference between common symptoms of a given illness and those that are most useful for homeopathic prescribing.
- HS-03 Identify the diverse presentations of signs and symptoms for certain conditions on male vs. female bodies, (i.e. heart disease, heart attack) as well as a spectrum of skin tones (skin conditions).
- HS-04 Apply knowledge of conventional medical diagnoses to make safe decisions about the range of individuals the practitioner will accept as clients and identifies when it would be appropriate to refer the client to a more experienced homeopath or conventional medical provider.
- HS-05 Identify signs and symptoms that may suggest a referral to emergency services or a conventional health care provider is needed
- HS-06 Identify the normal signs and symptoms and progression of common pathologies for infectious conditions
- HS-07 Identify the normal signs and symptoms and progression of common pathologies for malignant conditions
- HS-08 Identify the normal signs and symptoms and progression of common pathologies for immunological conditions
- HS-09 Identify the normal signs and symptoms and progression of common pathologies for skin conditions
- HS-10 Identify the normal signs and symptoms and progression of common pathologies for gastrointestinal and mouth and nutritional /metabolic disorders
- HS-11 Identify the normal signs and symptoms and progression of common pathologies for cardiovascular/hematological conditions
- HS-12 Identify the normal signs and symptoms and progression of common pathologies for endocrinological conditions
- HS-13 Identify the normal signs and symptoms and progression of common pathologies for musculoskeletal conditions
- HS-14 Identify the normal signs and symptoms and progression of common pathologies for ophthalmological conditions
- HS-15 Identify the normal signs and symptoms and progression of common pathologies for ear, nose, throat and respiratory conditions
- HS-16 Identify the normal signs and symptoms and progression of common pathologies for neurological conditions
- HS-17 Identify the normal signs and symptoms and progression of common pathologies for psychiatric conditions

- HS-18 Identify the normal signs and symptoms and progression of common pathologies for genitourinary and reproductive conditions
- HS-19 Identify the normal signs and symptoms and progression of common pathologies for pediatric conditions
- HS-20 Gather reliable information about prescription medications, supplements and herbal medicines in order to apply this information to homeopathic analysis or management of the case.
- HS-21 Recognize the purpose of common diagnostic and laboratory tests and research other tests a client undergoes to help guide homeopathic analysis and case management.
- HS-22 Identify the dangers and consequences of an individual withdrawing from drugs and substances, both prescribed and self-administered and recognize the danger of interfering with regimens of prescribed medications.
- HS-23 Refer a client with a question about a conventional medication or treatment back to the provider who prescribed the medication or treatment or to an equally qualified health care practitioner whom the client trusts.
- HS-24 Identify when it is appropriate to make referrals to other TCIM providers including massage, body work, acupuncture, osteopathic, chiropractic care and other fields in the community.
- HS-25 Observe the psychological and emotional functioning of individuals and how this may affect their health and well-being, including:
- a. Familiarity with the normal stages of child and adult development
  - b. Familiarity with the normal stages of response to stressful life events (e.g., death and dying, child and adult responses to trauma).
  - c. An appreciation of the dynamics of family and other relationships and their impact on the client's life circumstances and mental and physical health
- HS-26 Recognize and comply with the legal status of homeopathic practice in the practitioner's jurisdiction and place of practice

## **Section 3: Ethics, Professional Development, Practice Management, and Research**

### **Consumer Education in Homeopathy**

- CE-01 Educate clients about the safe and appropriate use of homeopathy.
- CE-02 Provide formal or informal general consumer education about homeopathy in the form of teaching classes, facilitating study groups, or hosting social media or online platforms. Such consumer

education shall:

- a. Focus instruction on addressing minor, first aid and self-limiting conditions;
- b. Help consumers distinguish between homeopathic and non-homeopathic products;
- c. Offer strong warnings to consumers to avoid the use of complex homeopathic treatment protocols that may be available on-line or in books to treat complex chronic conditions for themselves or others without direct consultation with a professional practitioner;
- d. Offer strong warnings advising consumers to avoid treating themselves or others with nosodes, sarcodes or remedies in high potencies;
- e. Advise consumers to seek care from a professional practitioner or licensed health care provider for chronic conditions and whenever a seemingly minor health condition is not improving in response to home treatment;
- f. Educate consumers about symptoms for which they should seek immediate medical care;
- g. Help consumers learn to identify reputable homeopathic practitioners by educating them about the four community-recognized credentials; CHP, LHP, DABHM, DHANP, and RSHom;
- h. Educate consumers about levels of expertise in homeopathy and how to pursue further education to become a professional homeopath.

## **Ethical and Professional Practice**

- ET-01 Identify the political and legal regulations and guidelines that impact their practice of homeopathy and operate within these regulations and guidelines.
- ET-02 Practice with integrity, responsibility and in accordance with the Code of Ethics and Conduct associated with their specific credential.
- ET-03 Promote the well-being of all clients regardless of race, gender, sexuality, or religious preference.
- ET-04 Obtain informed consent of the client, as appropriate
- ET-05 Encourage and participate in the development of understanding between colleagues
- ET-06 Recognize ethical and legal issues in a given case and manage them with professional integrity.
- ET-07 Maintain freedom from bias in all areas to ethically take cases.
- ET-08 Recognize when to refer to a different homeopathy practitioner when one cannot be unbiased.
- ET-09 Employ self-reflection methods and skills to explore one's bias and expand one's capacity.
- ET-10 Refrain from misleading or false advertising to clients, including "guaranteeing a cure".
- ET-11 Refrain from making medical diagnoses, unless licensed to do so

## **Personal and Professional Development and Conduct**

PD-01 Identify the interpersonal and communication skills necessary for practitioner development including:

1. Listening
2. Speaking
3. Presentation (written and non-written)
4. Face-to-face communication
5. Communication with clients, their families, healthcare professionals, colleagues, media
6. Awareness of non-verbal communication, body language, facial expression etc.
7. Awareness of culturally and socially appropriate personal forms address, pronouns, racial and ethnic groups, etc.

PD-02 Identify the important aspects of personal development as a practitioner, including:

1. Listening skills
2. Empathy
3. Trust
4. Intuition
5. Self-awareness
6. Self-confidence
7. Personal belief systems, explicit and implicit bias awareness: e.g. awareness of attitudes towards race, culture, nationality, ethnicity, religion, gender identity and sexuality

PD-03 Identify the important aspects of personal health management as a practitioner, including:

1. Skills for practitioners preserving and promoting their own health, development and well-being
2. Evaluating work / life balance
3. Stress management
4. Assertiveness
5. Boundary setting, e.g. client-practitioner relationship, work hours, communication management: phone, email, text, social media, etc.
6. Identifying and developing individual and ongoing personal and professional support systems

PD-04 Identify the regulatory issues that may affect homeopathy practice, including:

1. National and local legislation relating to the practice of a healthcare profession and the practice of homeopathy
2. In accordance with the Americans with Disabilities Act and other national, state and local laws, and human rights provisions, the professional homeopath provides care in a manner that does not discriminate on the basis of race, ethnicity, sexual preference, religion, age or gender identity.
3. Tax reports / returns, obligatory taxes and V.A.T (Value Added Tax)
4. Recording income and expenses, and managing bank accounts
5. National and local insurance requirements for a practitioner and health insurance schemes for clients
6. Registering with a professional association.
7. Confidentiality issues and awareness of disclosure legislation; i.e., situations in which client information must be passed on to another party
8. National requirements for the maintenance, retention, and destruction of client records
9. Awareness of the national requirements for pension contributions and the personal implications of planning for retirement provision
10. Awareness of national legislation
11. Business licenses, local and county levels

PD-05 Recognize the relevant aspects and issues of homeopathy practice management and business development including:

1. Choosing suitable premises with regard to the physical design of the practice (e.g. with regard to access for the disabled)
2. Awareness of confidentiality issues
3. Deciding hours, availability and appropriate coverage during times of unavailability
4. Managing phone calls, answering phone messages, email, texting, social media, etc.
5. Setting fees appropriate to local conditions and making it clear which services are covered by the fees.
6. Preparing a business plan (regularly monitored) including the amount of client fees, costs, salary expectations, etc.
7. Record keeping including case notes, remedies considered and selected, appointments, etc.
8. Creating client referrals and a network for reciprocal referrals with other providers
9. Clinical audits / practice audits: Clinic and practice audits which enable the homeopath to evaluate the effectiveness of their practice and build a body of knowledge that can be used for research purposes and for sharing information with peers.
10. Advertising methods

PD-06 State the aspects of Electronic and Data Management in homeopathy practice, including:

1. Data protection legal requirements –national and international legislation concerning the electronic filing of information
2. Homeopathic software - familiarity with the various homeopathic software programs available.
3. Backing up data – awareness of the need for regular backups and data storage

PD-07 Identify the important aspects of a positive Practitioner and Client Relationship, including:

1. Managing the first contact to help clients feel safe and motivated to commit to a course of homeopathy care.
2. Succinctly describe the framework of their practice such as when they see people for follow-ups, how they stay in touch in between appointments, costs, a description of the homeopathy interview, and clarification of the client's current understanding of the homeopathy process.
3. Discussing ways to encourage clients to follow through with homeopathy care.
4. Exploring ways in which to advise and support clients with changing a maintaining cause that is a significant aspect of their current lifestyle.
5. Determining when and how to involve other persons, such as family or other healthcare professionals.
6. Explaining to clients that homeopathy is a holistic system of medicine which may be an appropriate option for future health issues.
7. Encouraging accurate evaluation of progress from the client's perspective.
8. Providing clients with information to help them make their own informed decisions on wider healthcare and personal welfare issues, while remaining within their scope of practice

PD-08 Identify the best practices for Providing Services via Virtual Platforms including:

1. Demonstrate skills to guide the client through use of technology during a virtual session
2. Ask specific questions to ensure that the results of the virtual case taking is equal to or accommodating differences from face-to-face case taking
3. Ensure that confidentiality and privacy is attended to
4. Ask for images, photos to best display visible symptoms
5. Explain the advantages and disadvantages of virtual case taking
6. Learn to assess a client's health status from a virtual consultation
7. Be aware of practices and legalities of electronic storage
8. Learn to specifically ask extra questions that in a face-to-face environment are usually visible and obvious
9. Conduct pre-consultation tech tests
10. Acknowledge the value of home-based care
11. Incorporate digital storage and collation in the client file consultation augmentations (digital photos, text, image, emails, scans, tests)



## Research and Provings

- RE-01 Demonstrate familiarity with contemporary research on homeopathic medicines and their biological action.
- RE-02 Demonstrate familiarity with general health sciences research.
- RE-03 Demonstrate the ability to comprehend and evaluate trade and journal articles describing homeopathic and medical research studies, community science research in homeopathy, peer reviewed, published research papers on provings and other relevant research such as clinical outcomes research, practice-based outcomes research, observational research and educational research.
- RE-04 Recognize the purpose of provings, types of provings, and their importance to the evolution of the homeopathic materia medica.
- RE-05 Recognize national and international standards for conducting homeopathic proving—including the standards used by the HPCUS, and harmonized 2015 LIGA, ECH and ECCH guidelines.
- RE-06 Explain the importance of prover groups being as diverse as possible in terms of gender, sexual orientation, culture, race and ethnicity.
- RE-07 Explains important aspects of quality provings, including:
- a. conducting provings according to strict protocols established by respected homeopathic research organizations;
  - b. following appropriate informed consent procedures including those related to privacy and confidentiality; and,
  - c. implementing ethical standards for research involving human subjects in accordance with review by an Institutional Review Board