Clinical Observation and Apprenticeship Experience -- SAHS

I. Policy Statement: Under the direct supervision of a director, manager, or a designee, Saint Alphonsus permits qualified Observers to participate in one of two classes of observation/shadowing experience: clinical or non-clinical (business/management.) Such persons will be processed according to the procedures outlined below based on which observation/shadowing experience is being requested.

II. Definitions:
A. For purposes of this policy, "Observation and Shadowing Experience" is defined as an authorized, approved, designated time period spent with either 1) physician, clinician, therapist or associated personnel (Clinical); or 2) business or management personnel (Non-Clinical), including, but not limited to, Finance, PR/Marketing, Foundation, Quality Improvement, Materials Management, Health Information Management in order to obtain an understanding of the challenges, demands and lifestyles of the profession.
B. Observer is defined as a student seeking to observe/shadow clinical or non-clinical professionals in the hospital or clinic setting.
C. This policy does not apply to Students in a Clinical Rotation based upon an Educational Affiliation Agreement between Saint Alphonsus and the Student's Educational Institution.

III. Equipment: None.

IV. Procedure:
A. General Procedures
1. Clinical Observation/Shadowing Requests:
   a. All inquiries about an observation/shadowing experience should be directed to the Graduate Medical Education (GME) Department. Information can be found at the GME webpage: Student Observations and Shadowing Boise, Idaho (ID), Saint Alphonsus
   b. Observation for provider shadowing is limited to two (2) twelve-hour or six (6) four-hour periods for a maximum of 24 hours.
   c. Length of time spent in observation may be adjusted at the discretion of the manager/provider.
   d. Observers are permitted to return to the facility for an additional observation experience.
   e. Observation for an apprenticeship of several weeks or months, must have specific dates, course of study, hours and supervisor signature indicating approval on the application form.
2. Business/Management (Non-Clinical) Requests:
   a. All inquiries about an observation/shadowing experience for a business or management (non-clinical) area will be handled by the director, manager or designee of the unit or department of interest.
   b. The director/manager or designee will ensure the observation/shadowing requirements are met (Section B-2 & C-2 below), will schedule through direct communication with the prospective Observer the approved participation in the observation/apprenticeship experience.
   c. Observers are permitted to return to the facility for an additional observation experience in the future.
   d. Length of time spent in observation may be adjusted at the discretion of the manager.
   e. Observation for an apprenticeship of several weeks or months, must have specific dates, course of study, hours and supervisor signature indicating approval on the application form.

B. Observation/Shadowing Requirements

1. Clinical Observation/Shadowing Requirements:
   a. Observers in the Operating Room, Emergency Department, Intensive Care Unit, or any other trauma-related care area must be a minimum of 18 years of age.
   b. Observers in units/departments (other than those referenced in B.1.a) must be a minimum of 16 years of age.
   c. Observers will always wear an ID badge.
      (1) Observers will bring a clear photo ID (student ID/driver's license) and have it verified by the manager at the start of the observation experience.
      (2) It is the manager/designee's responsibility to ensure the photo ID is always worn by the Observer during the observation period in a clear sleeve on a lanyard.
   d. Observer will dress appropriately for the observation setting.
   e. Observer must complete the Student Observation Application Form prior to start date.
   f. Observer must provide the following:
      (1) Completed Observation/Shadowing Application with provider's signature
      (2) TB Test Results
      (3) Flu Shot verification (between November 1 and March 31)
      (4) Verification of full COVID-19 vaccination with at least two weeks between the final vaccination and the start date of the observation/Shadow experience.
      (5) Signed Confidentiality Agreement with provider's signature
      (6) Signed Clinical Observation Mandatory Education
      (7) School confirmation letter, on institutional letterhead, to GME verifying the observation is needed to either enter or maintain standing in an academic program.
   g. Observation packets will be retained in the GME Department for a period of six (6) years.
2. Business/Management (Non-Clinical) Requirements:
   a. Observers in non-clinical departments must be a minimum of 16 years of age.
   b. Observers must show manager/designee proof of a negative TB test (at their expense) within last 12 months.
   c. Flu shot verification must be obtained if observing/shadowing at a SAHS hospital or clinic between November 1 and March 31.
   d. Verification of full COVID-19 vaccination with at least two weeks between the final vaccination and the start date of the observation/Shadow experience.
   e. Observers must provide manager/designee an approval statement or letter signed by a school official, if applicable, sanctioning the observation and time and dates.
   f. Observers will always wear an ID badge.
      (1) Observers will bring a clear photo ID (student ID/driver’s license) and have it verified by the manager at the start of the observation experience.
      (2) It is the manager/designee’s responsibility to ensure the photo ID is always worn by the Observer during the observation period in a clear sleeve on a lanyard.
   g. Observer will dress appropriately in business-casual attire.
   h. Observer must complete the Student Observation Application Form prior to start date.

C. Confidentiality/Privacy and Security Procedures:
1. Clinical Observation/Shadowing:
   a. The physician, nurse, or other attending care provider must obtain a verbal consent from each patient to have the Observer present and document the consent in Progress Notes of the patient’s medical record.
      (1) The documentation must be done by the physician or clinician who obtained the consent.
      (2) It is acceptable to ask consent once, per patient/per shift, for EACH Observer in the unit/department.
   b. At no time will an Observer have direct physical contact with a patient.
   c. At no time will an Observer be left alone in a non-public area for any reason.
   d. At no time will an Observer access electronic or paper medical record.
   e. At no time will Observer access Saint Alphonsus' computer systems or any business sensitive information in hard copy.
   f. At no time will Observer participate in patient care in any way, including touching or handling of instruments.
2. Business/Management (Non-Clinical) Observation/Shadowing:
   a. At no time will an Observer have direct physical contact with a patient.
   b. At no time will an Observer be left alone in a non-public area for any reason.
c. At no time will an Observer access electronic or paper medical record.
d. At no time will Observer access Saint Alphonsus' computer systems or any business sensitive information in hard copy.

D. Administrative Policy
1. Clinical Observation/Shadowing:
   a. Original paperwork must be submitted to the GME Department for record retention.
2. Business/Management (Non-Clinical) Requests:
   a. Original paperwork must be submitted to the approving department manager for record retention.

E. Documentation Retention
1. Clinical Observation/Shadowing:
   a. All documents required under this policy (Section B) will be sent to the GME Department and retained for a minimum of six (6) years from its effective date.
   b. No documents will be destroyed before consultation with the Privacy Officer and/or legal counsel.
2. Business/Management (Non-Clinical) Observation/Shadowing:
   a. All documents required under this policy (Section B) will be sent to the GME Department and retained for a minimum of six (6) years from its effective date.
   b. No documents will be destroyed before consultation with the Privacy Officer and/or legal counsel.

F. Contact for Questions
1. Clinical Requests: GME Department
   - GME Manager: Diane Johnson
   - Education Coordinator: Kim Philipps
   - ICOM Education Coordinator: Clairece Rosatti
2. Non-Clinical Requests: Department specific

V. Related Policies/Forms:
A. Student Observation/Shadowing Application Form: shadowing-observations-application-8.21.2021.pdf (saintalphonsus.org)
B. Confidentiality & Network Access Agreement: confidentiality-network-access-agreement.pdf (saintalphonsus.org)

VI. References: None.

VII. Additional Approval:
A. Committee approvals:
   1. No Committees Selected in PPM.
B. Other approvals:
   1. Not applicable.