

TITLE: AUTHORIZATION OF APC & MEDICAL STUDENTS, MEDICAL LEARNER OBSERVERS & TEMPORARY MEDICAL STAFF GUEST, ASPIRUS INC

REPLACES: AWH OnBase Policy 7028 / PolicyStat 4463962 & ALH OnBase MS620B / PolicyStat 4799165 Authorization of Medical Staff Students & Observers; and AKH PolicyStat 137654 Medical & PA Students

ASPIRUS INC

PURPOSE:

TO DELINEATE THE RESPONSIBILITIES AND PREROGATIVES OF INDIVIDUALS ACCOMPANYING MEDICAL STAFF MEMBERS (AS DEFINED BELOW) TO OBSERVE OR PARTICIPATE IN PATIENT CARE-RELATED ACTIVITIES AND TO PROVIDE UNIFORM OBJECTIVE GUIDELINES FOR THE CONTEXT OF PATIENT INTERACTIONS OBSERVERS AND STUDENTS (AS DEFINED BELOW) MAY HAVE.

ASPIRUS, INC. & SUBSIDIARIES SUPPORT AND ENCOURAGE EDUCATIONAL ACTIVITIES IN ALL AREAS RELATED TO HEALTH CARE. ALL SUCH ACTIVITIES MUST, HOWEVER, OCCUR IN A STRUCTURED ENVIRONMENT AND BE IN COMPLIANCE WITH ALL POLICIES AND PROCEDURES OF THE HOSPITALS/CLINICS AND THE MEDICAL STAFF.

AREAS AFFECTED:

- Physicians, Advance Practice Clinicians (APC), and Affiliated Physicians throughout the Aspirus System
- Aspirus, Inc. & Subsidiaries (Hospitals, Clinics, and Ambulatory Surgery Centers)
- All departments providing observation experiences to students interested in careers in medicine and rotation experiences to students enrolled in medical programs (APC, medical school).
- Administration

DEFINITIONS:

Medical Staff: Physicians, Advance Practice Clinicians (APC), and Affiliated Physicians within the Aspirus System

Observer: Any individual currently enrolled in pre-medical education, physician assistant, nurse practitioner, certified nurse midwife, or certified registered nurse anesthetist program, or with another compelling educational purpose intending to observe (shadow) a member of the medical staff. Observers must be 16 years of age or older and limited to one day per year. Observing will be addressed by Business Unit (BU) designee and respective BU observer/shadow policy on a case-by-case basis (see Reference section). If Observers are onsite for more than one day (at different locations, in a different department, one day per semester, etc.), they must complete the compliance work of a Student as listed under Procedure, Section II below.

Student: Defined as a “medical learner.” A medical learner is any student currently enrolled in a medical, physician assistant, nurse practitioner, certified midwife, or certified registered nurse anesthetist program that will be rotating with a member of the Medical Staff. Note: this policy does not address allied health and /or nursing students.

Temporary Medical Staff Guest: Individuals who are qualified for Medical Staff membership and clinical privileges, and desire to participate in patient care.

Direct Supervision: The Medical Staff is present in the exam room, procedure, or Operating Room (OR) directly with the medical learner supervising the provision of care.

SCOPE OF POLICY:

This policy applies only to any student currently enrolled in a medical, physician assistant, nurse practitioner, certified midwife, or certified registered nurse anesthetist program that will be rotating with a member of the Medical Staff and to any observer or temporary medical staff guest as defined above.

POLICY:

- I. Authorization of Individuals who are qualified for Medical Staff membership and clinical privileges, and desire to participate in patient care:**
 - A. Must apply for and be granted Temporary Privileges as described in the respective Business Unit Medical Staff Bylaws.
- II. Authorization requirements for Students (as defined above):**
 - A. All students must be sponsored by a member of the Active or Courtesy Medical Staff.
 - B. All students must meet approved health work requirements (see Procedure Section III) and provide evidence through written documentation.
 - C. All students must be enrolled and in good standing in an accredited school (e.g., Medical schools accredited by Liaison Committee of the American Medical Association and American Association of Medical Colleges). Documentation must be provided.
 - D. All students must complete compliance, confidentiality and background check requirements.
 - E. Insurance coverage
 1. All students & /or their affiliated school must provide evidence of professional and general liability insurance upon request of the Aspirus business unit responsible for the rotation. In the event that the student or their affiliated school does not possess or provide professional and general liability coverage, the student shall then be considered a Student of Aspirus for purposes of liability insurance and will be included as an insured on Aspirus' Professional and General Liability program.
- III. Authorization requirements for Observers (as defined above):**
 - A. All observers must be sponsored by a member of the Active or Courtesy Medical Staff
 - B. All observers must meet approved health work requirements and provide evidence through written documentation.
 - C. Each observer must complete confidentiality requirements.
 - D. Insurance coverage
 1. All Observers are considered Students of Aspirus for purposes of liability insurance. Those who are merely observing care and treatment rather than providing it shall be included as an insured on Aspirus' Professional and General Liability program.
 - E. Observers desiring extended shadow time (more than 1 day/year) must be approved by the Business Unit Designee and complete compliance and background check requirements as identified in Procedure Section III.

ROLE / SCOPE OF ACTIVITIES:

- I. Patients shall be fully informed and concur to the participation of students/observers in their care and/or to the observation of the care.
- II. All patient contacts or observations will be under the direct supervision of the participating member of the Medical Staff.
- III. The scope of practice of the student shall be defined by the supervising practitioner based on the individual student's level of training and experience, as well as the Aspirus-defined scope of practice for the student's discipline, if applicable (i.e., for specialty privilege, contracts with schools, etc., a memo of understanding signed by the Office of Medical Education, Aspirus Hospitals/Aspirus Clinics/Ambulatory Surgery Center and the school may provide further details on what the student is expected and allowed to

do). Students may:

- A. Write progress notes in the electronic health record (e.g. EPIC). All such notes must be clearly identified as student notes. Student notes may not be entered in lieu of hospital staff or attending practitioner notes. All students' notes must be at minimum countersigned by the participating practitioner. Students and supervising provider(s) must adhere to Student Documentation Policy 14681.
 - B. Students may dictate using their own dictation ID into the electronic health record. Again, all reports must be, at minimum, countersigned in the electronic health record by the sponsoring practitioner. Students will only be able to dictate H&Ps, OP/Procedure reports, Discharge summaries, psychiatric note, Consultation, ED notes, letters, etc.
- IV. Observers do not have a scope of practice permitting participation in patient care. Observers may observe care but may not participate in the provision or documentation of care.

PROCEDURE:

- I. Each student/observer, student's school clinical coordinator or sponsoring practitioner/hospital staff member will contact the Office of Medical Education in writing, to inform them of the student's/observer's name, school, and begin and end dates.
 - A. Thirty (30) days' notice is requested.
 - B. Students/observers are approved for a specific timeframe with a specific sponsoring practitioner.
 - C. Students/observers who will be observing/rotating practitioners from multiple physician groups will need written approval from the group's sponsoring practitioner or administrative designee.
- II. The Office of Medical Education or Business Unit Designee will send a confirmation communication to the student/observer after the following have been received: required health documentation, letter of good standing from the student's school (for rotating students), and approval notice from sponsoring practitioner(s).
- III. All students/observers shadowing/rotating for more than 1 day should be oriented to the hospital and/or clinic and will need to complete more compliance requirements.
 - A. Student documentation to be submitted to the Office of Medical Education. Observer documentation to be submitted to Business Unit designee (only for shadows in excess of 1 day):
 - 1. Proof of immunity to Rubella, Rubeola (Measles), Mumps and Varicella (Chicken Pox)
 - A. Proof of immunity requires either appropriate full immunization(s) documentation or lab testing showing immunity
 - A. MMR=2 vaccines or immunity
 - B. Chicken Pox = 2 Varicella vaccines or immunity
 - B. Equivocal lab testing indicates need for vaccination
 - C. Self-reported history of disease is not considered proof of immunity
 - 2. Annual Mantoux TB Skin Test (within one year of placement)
Documentation of the following is required:
 - A. Provide last 2 TB skin test (TST) no more than 12 months apart
or
 - B. A QuantiFERON Gold test or a T-Spot test within the last 12 months
or
 - C. If student has never had a TB skin test before, or has let more than 1 year lapse since their last one,
 - A. A "2 step" TB skin test or a QuantiFERON Gold test or a T-Spot test
 - B. The second test must be done at least 7 days from when 1st one is **READ** but within 3 weeks

D. A **positive** TST, QuantiFERON Gold test or a T-Spot test, requires all of the following:

- A. Documentation of the Positive results
- B. Documentation of a negative chest x-ray after the positive TB testing result—One baseline to be submitted
- C. Completed TST questionnaire on an annual basis

*** In the event a student is exposed to TB during a clinical experience, the health care organization will notify the school. The school will notify the student and follow the CDC guidelines.

3. Hepatitis B Immunization Series **and** Post Vaccination Antibody Screen:

This is a series of three vaccinations and post vaccination antibody screen. Proof of vaccination **and** a positive Hepatitis B Antibody titer; **or** signed Declination form are required. The vaccination series is voluntary, but is highly recommended for all students entering a health career field.

4. Tdap vaccination is recommended, if not obtained a declination form is to be signed. The vaccination is voluntary, but is highly recommended for all students entering a health career field.

5. Adheres to Influenza Prevention Program participation (seasonal), either vaccine or declination per the Mandatory Influenza Vaccination Compliance Policy #5282484

6. A signed confidentiality agreement per Aspirus policy. All students are responsible for confidentiality of all patient, employee, hospital and clinic information.

7. A completed Background Information Disclosure form.

8. Wisconsin or Michigan Caregiver Background Check results.

9. Attestation to completion of orientation requirements which includes information on blood borne pathogens, preventing TB, fire safety, working with hazardous materials, disaster and emergency preparedness, corporate compliance, customer service, and HIPPA.

*Note if observer is shadowing only 1 calendar day none of the items above are required except a signed confidentiality agreement.

IV. An email will be sent to respective Aspirus Hospital and/or Clinic management (or designee) and supervising provider(s) with the information on the student's/observer's arrival/departure dates, etc.

MISCELLANEOUS:

I. Students/observers will be required to wear a student badge provided by Aspirus.

II. Students/observers will park in employee parking areas only.

III. Students/observers will have access to Medical Library resources.

IV. Housing arrangements will be the responsibility of the student/observer, unless otherwise approved and arranged.

REFERENCES:

1. PolicyStat ID: 5282484 Mandatory Influenza Vaccination Compliance Policy

2. PolicyStat ID: 5364733 Confidentiality Policy

3. PolicyStat ID: 4388066 Employee Health, Immunization of Employees, Vaccine-Preventable Infectious

Diseases

4. PolicyStat ID: 4387308 Employee Health Services, Tuberculosis Management Program, Tuberculosis Testing, Treatment, Reporting and Follow-Up
5. PolicyStat ID: 4389333 Employee Health, Management of Exposure to Blood or Body Fluids, Reporting Significant Exposure and Follow-Up
6. PolicyStat ID: 4389383 Employee Health: Control of Communicable/Infectious Diseases, Post-Exposure Prophylaxis, Work Restrictions and Follow-Up
7. PolicyStat ID: 4387456 Exposure Control Plan - Employee Health Services (AWH)
8. Policy ID: 4482882 Visitors/Observers in Operative/Procedural Environment (AWH Surgical Services & Birthing Center)
9. PolicyStat ID: 4691133 Visitors/Observers/Technical Representatives in the Surgery Center (ASPSC)
10. PolicyStat ID: 4353345 Practitioner Background Checks
11. PolicyStat ID: 4353712 Job Observations (AI, ACI, ASP, AWH, PAC)
12. PolicyStat ID: 4385043 Student and Faculty Supervision (Unpaid) (AINC)
13. PolicyStat ID: 4483110 Credentials Policy AWH
14. PolicyStat ID: 4463982 Credentialing of ACI Providers

REVIEWS:

03/12/19 - Approved by Quality and Patient Safety Council (QPSC).

01/29/19 - Central WI Anesthesia

01/22/19 - Scott Remmich, Chief Compliance Officer

01/18/19 - Student Process Unification Workgroup Review

01/16/19 - Insurance & Liability Coverage language approval (Kristin Phillips & Attny Chris Toner)

01/04/19 - Coding & Revenue Cycle

12/03/18 - System Clinical Policy Committee (SCPC) Review

11/20/18 - System Manager of Employee Health Review

11/13/18 - AWH MEC Consent Final Review

10/09/18 - AWH MEC Initial Presentation

09/27/18 - Kevin O'Connell, MD, Medical Director, Office of Medical Education

09/25/18 - AKH Review Regional Director Review and approval with comments

09/21/18 - ALH Provider Support Services Review and approval