

POLICY TITLE: *Clinical Procedures/Patient Encounters Checklist Policy*

APPROVAL DATE: *June 6, 2019*

RESPONSIBLE DEPARTMENT: *Office of Medical Education*

APPLIES TO: *M3 Students*

POLICY STATEMENT

The COM, as specified by the EPC, requires medical students during the M3 year to track and record documentation for: 1) a defined set of clinical procedures that the student must perform or observe during the M3 clerkships, and 2) patient encounters in which the student must fully participate during the M3 clerkships (see **APPENDIX III -- Required Clinical Procedures** and **APPENDIX IV – Required Patient Encounters**). Procedures and encounters are listed by individual clerkship.

For definitional purposes, procedures are identified as being required to either be performed or observed. Students are encouraged to work with their attending physicians and residents to perform procedures on live patients wherever possible.

Perform: Performance of a procedure is defined as performing or assisting in the performance of a required procedure with appropriate supervision from an attending or resident.

Observe: Observation of a procedure is defined as watching an attending or resident perform the procedure in a clinical setting. The student is not assisting in the procedure.

For definitional purposes, patient encounters are identified as students being required to observe or fully participate in the care of the patient. The student is expected to evaluate, diagnose, formulate treatment plans and manage as appropriate to the student's educational level (with appropriate attending or resident supervision).

Participate: All patient encounters require students to fully participate. Participation in patient encounters includes acting as the caregiver (with appropriate attending or resident supervision) of the patient on the service or clinic, aiding in a complete or problem focused history, physical, and diagnostic/therapeutic plan. This includes the ongoing management of hospitalized patients.

Observe: Observation in patient encounters implies no direct patient contact (e.g. taking a history or performing a physical, participating in diagnostic/therapeutic plan for that patient). Examples might be observing another care provider providing the service (as part of team rounds) or being shown a physical exam finding on rounds.

The following guidelines discuss the documentation by the student of procedures performed or observed, and patient encounters that the student completes. With respect to procedures, the underlying premise is that students learn the indications and contraindications, the appropriate techniques, and the possible complications and outcomes for each of the delineated procedures. Sources such as the *New England Journal of Medicine Videos in Clinical Medicine* series which is accessible through the Harrison Health Sciences Library may be useful.

- A. Students must complete and log clinical procedure requirements and patient encounters during the assigned clerkship.
 1. Students are encouraged to enter clinical procedures or patient encounter data on a daily basis within MedOneStop. Directions on how to use Patient Encounters and Procedures can be found on MedOneStop.
 2. Logging a patient includes a form to capture the relevant data from the procedure/encounter. The form will prompt you to document patient age, gender, chronicity, location, and supervising physician. The supervising physician is the physician (attending or resident) who was immediately available at the time of the procedure/encounter. The student should provide basic details, including a brief summary of the

patient's complaint, what the differential or etiology might be, other medical co-morbidities (like Diabetes, Hypertension, etc), and if there was a complication (for the procedures).

3. Clerkship directors will approve the clerkship appropriate encounters after logging has been completed by the student.
 4. Students are **required** to enter the information within 7 days of completing the clinical procedure or patient encounter. A student may not receive credit for a clinical procedure or patient encounter that is not submitted within 7 days of performance of the procedure or encounter. Any such decision is at the sole discretion of the clerkship director and is not subject to appeal or review.
 5. For documentation purposes, the students should document at least one (1) of each of the patient encounters and procedures designated for that clerkship. Students are encouraged to perform more than the one required encounter/procedure and may submit documentation of multiple procedures and encounters.
- B. During the mid-clerkship feedback session with clerkship leadership, the student should present their progress on the patient encounter and procedure checklist and a plan for completion should be discussed. Students who are experiencing difficulty completing the required clinical procedures or documenting the required patient encounters prior to the end of the clinical rotation must contact the clerkship director and the clerkship coordinator *via email at least one week prior to the end of the rotation* with an explanation of the procedures or encounters that the student is experiencing difficulty with, and any circumstances as to why the student is experiencing difficulty.

At the sole discretion of the clerkship director the student may be assigned an alternate means of meeting the requirement such as viewing a video of the procedure(s) in question or assigning the student to complete a procedure in a simulation setting that was otherwise required on a live patient. If a student has not contacted the clerkship director in the appropriate timeframe and does not complete documentation of the procedures or encounters by the start of the end of clerkship examination, the consequences as listed below in section C will be in effect unless the clerkship director has identified extenuating circumstances for which any procedure or encounter in question was not available for the student to perform or observe.

- C. Students who have not correctly completed and documented all required assigned procedures and encounters on a clerkship by 5:00 pm on the day before the end of clerkship and shelf examination will receive a 5 percent (5%) deduction on their final grade for the clerkship. This deduction may result in a lowering of the grade category (e.g. from H to HP, from HP to P, or from P to F). The grade will be marked as an "Incomplete" until all patient encounters and procedures are documented.
1. Students who fail to complete and document all procedures and encounters by the end of the clerkship will receive the grade deduction as above. The student then has 14 days from the end of the clerkship to complete and document the encounters/procedures. The student is not excused from any clinical/educational activities on any subsequent clerkships or rotations to complete the missed assigned procedures from a previous clerkship. If not completed within the 14-day time frame the grade will be changed from an "I" to a "C".
 2. Failure to complete and document all patient encounters and procedures within 90 days from the end of a clerkship will result in a grade of Failure (F) for the course. The F will be reflected on the student's transcript and the student will be subject to the appropriate PAC policies with respect to receiving such a grade. The student is not excused from any clinical/educational activities on any subsequent clerkships or rotations to complete the missed assigned procedures from a previous clerkship.
- D. Monitoring of students' procedures and patient encounters:
1. During the clinical rotations, student compliance with documentation of required procedures will be monitored by clerkship directors and/or appropriate designees (coordinators). All encounters and procedures will be approved after being logged with appropriate details by the clerkship director on the rotation that is appropriate (e.g Thyroid disease will be approved by the Internal Medicine clerkship director).

2. Throughout the academic year, select faculty and Office of Medical Education staff may randomly sample student records to verify overall program compliance.

Any student who fails to complete required procedures in a timely fashion within a given clerkship will be monitored by the Performance and Advancement Committee (PAC). Students who fail to complete procedures in a timely fashion on more than one clerkship may be subject to further action related to professionalism in addition to any grade sanctions as described above.