

EDUCATION & TRAINING FOR THE NEXT GENERATION

Health Professions Student Playbook

This Playbook, a detailed step-by-step resource guide, will guide you through the process of establishing a streamlined and efficient health professions student training program at your health center organization.

*Each play in the Playbook has an overview section to help you conceptualize the crucial components involved in the play and has a template section to provide guidance on constructing the narrative. We encourage you to incorporate as much or as little of the template as you personalize your playbook but we've identified in **blue** the sections that we feel are best practices for an efficient, quality process. When personalizing your playbook to fit your organization, we suggest that you use detailed, instructional content and visuals to enhance each play.*

Health Professions Student Playbook

Introduction and Background

Overview:

Developing a comprehensive program manual to encapsulate all tracking, monitoring, training and educating of students and trainees who are granted the opportunity to learn at your organization is essential to organizing and supporting, high quality, satisfying, and productive educational and training experiences. *Use the below questions as a guide to construct this section:*

1. What are your goals, values and aims for health professions student training at your organization?
2. Where will the health professions student training documents, process, and policy documents be stored at your organization?

COVID 19 UPDATE-

Although we are uncertain of the duration and lasting impact of COVID, we know health centers will be on the front line to manage COVID responses. The COVID pandemic required adaptation of our clinical models of care, including telehealth. It is more imperative than ever that health center train the next generation as the pipeline of health workforce students across the country may be seriously compromised. We need to prevent a workforce shortage five years from now by filling the student pipeline now.

Aims:

- Realign your goals, values and aims for health professions student training in this new COVID lens
- Make this priority clear to your organization

While staff at health centers are asking for help on every level of the pandemic, we encourage health centers to invest in the next generation by sustaining or developing clinical training and education programs at all levels given current levels of stress and concern over exposure.

Play #1 –

Partnership Approval and Communications with Schools

Overview:

It is vital for your organization to identify the appropriate positions who will manage communication and documentation throughout the term of the relationship with the academic institutions. **In this section, review the responsibilities and identify the appropriate position(s) to manage these functions.**

The responsibilities are as follows:

- Respond to all application questions and requests
- Assess and review school affiliation requests
- Collaborate with contact personnel at academic institution to complete forms, contract/agreement or addendums

COVID 19 UPDATE-

Through the COVID 19 pandemic across the nation, health centers and academic institutions will encounter the continued threat of shut down, which will greatly impact the ability to execute on partnerships. With this in mind, organizations should consider revising their communication strategy with existing and potential partners. The responsibilities are as follows-

- Maintain clear and constant communication about organization's COVID response including potential reopenings and potential closures
- Continue to respond accordingly to all application questions and requests regardless of organization's capacity to maintain good relationships through the pandemic

Communication Template-

Good Afternoon,

We know that you and your program are working through the very challenging issues related to the COVID-19 pandemic just as all of us at organization name here are. After careful consideration, organization name here has decided that the best course of action right now is to end the current clinical placements at all organization name here sites until further notice. We do not take this step lightly, but feel it is the right thing to do.

We will continue to keep you and all of our academic partners updated over the coming weeks. We know you will have many questions about the coming semester rotations.

We know that this may pose significant challenges, especially for graduate students who are close to graduation and/or in their final semester with requirements for clinical hours in order to graduate. If a student is very close to that threshold, please let us know. We will certainly try to prioritize these students when we are able to again host your students.

If you have any questions please feel free to reach out to insert contact name here (insert contact email here) or by phone at insert email here.

Sincerely,

Template: Use the answers to the above questions to fill in the template

The designated school contact personnel will communicate with Insert appropriate position(s) regarding all applications, questions and requests. Insert appropriate position(s) review school request details to determine whether the organization will accept additional academic affiliations at that time, **including regular updates on COVID 19 response and impact on student training.**

The designated school contact personnel will complete all necessary information within the affiliation agreement and will submit a signed copy to Insert appropriate position(s).

Key Steps for determining School Relationship

- All school requests will be evaluated by Insert appropriate position(s)
- Determine if organization is interested
- Organization will review for appropriateness and provide feedback
- **Decision to affiliate with university can be based on some of the following:**
 - **Geography**
 - **Ranking**
 - **Strategic partnership**
 - **Capacity for requested discipline**
 - **Current staff alumni**
 - **Willing and available preceptors**

- Capacity
 - Contributions to pipeline
 - **Ability to accommodate COVID 19 restrictions and supplemental learning opportunities**
- Insert appropriate position(s) reviews academic affiliation to assure all documentation is complete

Key steps for initial communications with approved but not contracted school:

- School identifies the health professions track or program which they are seeking clinical rotations
- **The school acknowledges that the request for placement as an educational site will be made by the academic program, not the individual student**
- Insert appropriate position(s) requests a copy of the standard affiliation agreement for clinical rotations for review
- Upon receipt, Insert appropriate position(s) will review the contract to assure the following criteria are met:
 - Start/end date
 - School assumes responsibility to assure infection control/immunization/health statement requirements are met
 - Termination procedure
 - Contact information
 - Liability insurance
 - Emergency process
 - Student's learning objectives **(Very important to have these objectives on file to ensure appropriate response to supplemental learning opportunities)**
 - Confidentiality/privacy
- Organization will provide feedback; that the 1. Affiliation agreement is acceptable or 2. Requires revisions
- Once we have an acceptable affiliation agreement, both parties sign
- Insert appropriate position(s) ensures full execution of affiliation agreement and submits to Insert appropriate position(s)

Important Note: if school contacts provider directly, the provider either refers the individual to the Insert appropriate position(s) or the provider will contact the Insert appropriate position(s) with all information.

Play #2 –

Affiliation Agreement Management

Overview:

Organized and efficient management of established affiliation agreements is important to a quality health professions student training program. **In this section, review the responsibilities and identify the appropriate position(s) to manage these functions.**

The responsibilities are as follows:

- Management of affiliation agreements
- Development of a process, system and location for affiliation agreement storage
- Ensure affiliation agreements are up to date

COVID 19 UPDATE-

Through the COVID 19 pandemic across the nation, health centers and academic institutions will encounter the continued threat of shut down, which will greatly impact the ability to execute on partnerships. With this in mind, organizations should be well informed on the contractual obligations associated with each partnership. The responsibilities are as follows:

- Review all active affiliation agreements associated with active students or incoming students working either on site or remotely during COVID 19 pandemic
- Determine areas for revisions or renegotiation based on contractual obligation and notify leadership
- Identify details of the contractual obligations per each affiliation agreement (e.g. number of slots, days/time, types of students) and notify leadership
- Develop effective communication to partners on determined need for renegotiation of affiliations (see play 3 on assessing capacity to determine when renegotiate is needed)

Communication Template for Revisions to Agreements-

Dear *Enter Contact Name Here*

I hope this message finds you well. The health of our community, including staff, students and faculty, is our top priority at *enter organization name here*. *Enter organization name here* is taking measures to ensure the safety of our community as well as those under our care. Since March, our leadership team has been closely monitoring the ongoing Covid-19 outbreak to determine how we are going to provide services to our community and educate students in this new environment.

Following advice provided by the Center for Disease Control and Prevention, state and university experts in order to help prevent the spread of Coronavirus, we are not sure if we will be able to resume services by *enter date here*. Given the uncertainty of gradually reopening of our facilities with the progression of Covid-19, we unfortunately cannot commit to student placements for the *enter semester* semester at this time. *Enter organization name* feels strongly about providing exceptional experiential learning rotations for our students, and we look forward to resuming placements when it is safe to do so at our facilities.

Our leadership team will continue to assess the situation over the coming days and weeks and provide updates to our academic partners if we will be able to provide placements this *enter semester*.

If you have any questions, please feel free to reach out to *enter contact name*, who can be reached at *enter email here*.

Sincerely,

Play #3 –

Student Capacity

Overview:

Determining the capacity your organization can accept a student is extremely important. **In this section, identify the position(s) that will take on the following responsibilities.**

The responsibilities are as follows:

- Assess and approve your organization’s clinical staff on their availability to precept
- Maintain an available preceptor capacity report that outlines clinical staff available to precept
- Communicate with available preceptors regarding their interest in accommodating a student
- Assess secondary review for available space, day(s) of the week, and time once a preceptor is willing and able to precept
- Formally match preceptors to students

COVID 19 UPDATE-

Through the COVID 19 pandemic across the nation, health centers are transitioning significant elements of clinical services to virtual/remote/telehealth as well as hybrid models of in-person/virtual. With this in mind, organizations should regularly reassessing the organization’s capacity based on adaptations to the model of care. The responsibilities are as follows:

- Regularly reassess capacity following and any responses to COVID 19 pandemic (e.g. outbreaks, closures, changes in CDC/state mandated policies)
- Continue to monitor schedule changes and adjustment for all potential preceptors (e.g. days in person on site, days conducting virtual)
 - Note: Organizational policies regarding remote or in-person work will vary across organizations based on a variety of factors. In order to maintain and monitor capacity through the pandemic, an individual must be tasked with monitoring these adaptations. See below template to use for monitoring these adjustments.

Template for Tracking and Report on Availability-

Site Name				
Discipline	School	Supervisor	Hours	Number of Students
BH - Psychiatry	Yale		1 day / week	1
Medical - NP	UConn		1 day / week	1
Nursing BSN	WCSU		1 day / week	1

- Identify available slots and preceptor preference
- Inform leadership on capacity and recommendations for revisions/renegotiation to contractual obligations
- Develop effective communication to partners on ability to accommodate their requests
- Ensure assessment of available space, day(s) of the week, and time once a preceptor is willing and able to precept to ensure alignment with CDC guidelines
- Confirm academic partner agrees on supplemental learning activities and remote/online learning infrastructure

Template: Use the answers to the above questions to fill in the template

Insert appropriate position(s) reviews the available preceptor capacity report to determine clinical staff available to precept. Insert appropriate position(s) talks to available preceptors to determine interest. If willing preceptor, secondary review for available space, day(s) of the week and time by Insert appropriate position(s). Insert appropriate position(s) formally matches the preceptor to the student.

Key Steps:

- School provides student specific information on addendum form and submits to Insert appropriate position(s).
- **Student acceptance is based on:**
 - **Timing (hours per day/per year, internship hours or clinical rotation per semester)**
 - **Preceptor availability**
 - **Site/Pod space available**
 - **Training**
- **Other possible criteria to keep in mind for student acceptance:**
 - **Contracted School**
 - **Student's Mission**
 - **Potential for recruitment**
 - **Languages**
 - **Timing/Availability**
 - **Preceptor capacity**
 - **Physical space**
 - **Prepared for Primary Care Setting**
 - **Clinical leadership has approved provider for precepting**
 - **Provider requested student/personal request**

- Acceptance decision is made by Insert appropriate position(s)
- Insert appropriate position(s) signs the addendum
- Insert appropriate position(s) emails the addendum to the 'student onboarding' distribution list
 - Regional Vice Presidents
 - Operations Managers at each site
 - IT
 - HR Business Partners

Play #4 –

Initiating the Onboarding of a Student

Overview:

This play exhibits when, how, and who to communicate with regarding all student details. Developing a communication plan to inform key departments involved in the student training process on the details of the student placement is crucial to an efficient, streamlined process. **In this section, identify the position(s) that will take on the following responsibilities.**

The responsibilities are as follows:

- Initiating communication to key departments on the student placement details
- Ensure the completion of an addendum to the affiliation agreement that outlines the student details
- Communicate with appropriate department to coordinate and confirm the appropriate technical and equipment needs for the placement
- Communicate with appropriate department to coordinate and confirm training needs for this placement

COVID 19 UPDATE-

Through the COVID 19 pandemic across the nation, health centers will need to adapt their onboarding processes to account for CDC guidelines (e.g. PPE) and transition to remote placements. The responsibilities are as follows:

- Determine appropriate PPE requirements for placements with leadership overseeing placements, academic partners, and preceptors
 - Note: Some academic institutions are requiring COVID testing and/or fit testing prior to placement
- Notify IT to begin set up on secure platform approved by security team for use of personal laptops during placement
- Notify Training Team of number of students and type of training(s) needed for remote training on electronic health record and other associated systems
- Continue to monitor schedule changes and adjustment for all potential preceptors (e.g. days in person on site, days conducting virtual)

Play #5 –

Communication with Student

Overview:

A quality student experience begins with effective communication from the initial point of contact. *In this section, identify the position(s) that will take on the following responsibilities.*

The responsibilities are as follows:

- Formally welcome and communicate onboarding details to the student(s)
- Ensure all onboarding paperwork is completed prior to beginning placement
- Orientate students to company rules and regulations including HIPAA regulations

COVID 19 UPDATE-

Through the COVID 19 pandemic across the nation, this role will require additional responsibilities as follows:

- Monitor barriers to satisfying infection control requirements (e.g. PCPs limiting routine care due to COVID-19)
- Ensure background checks have been submitted accordingly
- Identify students who do not have access to personal laptops for placements
- Coordinate fit testing if deemed necessary for placements
- Determine appropriate method for collecting needed Human Resources documentation
- Refine onboarding communication for students completing placements virtually

Onboarding Email Template for Remote Students-

Good Afternoon,

I hope this email finds you well. Below are the onboarding requirements for you to start your placement with *enter preceptor name here* this *enter semester here*.

1. *Onboarding paperwork information*
2. *Discipline specific paperwork (e.g. background checks for behavioral health)*
3. *Vaccination information*
4. *HIPPA training information*
5. *Discipline specific onboarding information*
6. *Information on logging in securely from personal desktop*
7. *Technical training information*

Feel free to reach out if you have any questions, welcome to *enter organization name here!*

Sincerely,

Onboarding communication for students participating in rotations on site during the COVID-19 pandemic will need additional instructions on appropriate PPE, instructions for onsite logistics, etc. Please ensure to tailor the above email based on that information.

Template: Use the answers to the above questions to fill in the template

After fully executing an addendum to the affiliation agreement outlining the student details, Insert appropriate position(s) sends each student a welcome email with onboarding details that will assure efficient and effective student onboarding.

Key Steps:

- Insert appropriate position(s) emails student and school representative the following documents with cc: to assigned Preceptor
 - **Non-Employee onboarding packet for student to complete**
 - **Non-Employee manual**
 - **Dress code** (Only appropriate for onsite placements during COVID-19)
 - **Site details (parking, pods, etc.)** (Only appropriate for onsite placements during COVID-19)
 - **Instructions on photo identification (badge)** (Only appropriate for onsite placements during COVID-19)
 - **Assigned date and location for technical training** (All training will be conducted remotely during COVID-19)
- One week prior to start date, Insert appropriate position(s) follows up with student to assure all paperwork has been completed and any outstanding questions are answered
- Insert appropriate position(s) adds student email to internal distribution list and sends to appropriate department to add to external email distribution list (**VERY important during COVID-19**)

Play #6 –

Student is Trained

Overview:

An effective health professions student training program involves training on the electronic health record, policies, standards, and functions within the organization and appropriate clinical discipline. **In this section, identify the position(s) that will take on the following responsibilities.**

The responsibilities are as follows:

- Identify the appropriate training needs for each student

- Collaborate with the appropriate department to identify the next available technical training
- Coordinate with the student(s) regarding their availability to attend next available training

COVID 19 UPDATE-

Through the COVID 19 pandemic across the nation, this role will require additional responsibilities as follows:

- Ensure students have appropriate equipment and training to access the technical training remotely

Template: Use the answers to the above questions to fill in the template

Students and trainees approved for placement will be trained in all appropriate systems and functions necessary for their area of work. Insert appropriate position(s) will identify the appropriate training needs for the specific student. Insert appropriate position(s) determines the next available training date.

Key Steps:

- Insert appropriate position(s) will communicate with the school and/or student relating to the next available training
- **Students will attend training classes as scheduled. If they are unable to attend the dates assigned, they will be assigned to the next designated training date for their area.**

Play #7 –

Student Arrives or Begins Virtually

Overview:

When the student arrives **or begins a virtual placement** at your organization, it is important to assure that key personnel have been notified in advance and all equipment is prepared for the student arrival. **In this section, identify the position(s) that will take on the following responsibilities.**

The responsibilities are as follows:

- Ensure that the student and preceptor have coordinated start date
- Coordinate appropriate facilities access and space for the student
- Communicate with site operations team and clinical leadership of student start date
- Ensure that the site has the appropriate equipment for the student

COVID 19 UPDATE-

Through the COVID 19 pandemic across the nation, this role will require additional responsibilities as follows:

- A student's ability to begin placement is contingent on a variety of factors (e.g. infection control, background checks, IT set up, technical training). It is important to effectively communicate with preceptors, academic partners and the students about their progress towards completion
- Once a student has satisfied all requirements, communication to all key players should be initiated
- For virtual placements, supervisors can determine start dates once requirements are satisfied
- For in-person placements, it is important to discuss start dates with operations, leadership and preceptors to ensure compliance with all COVID-19 guidelines

Template: Use the answers to the above questions to fill in the template

The student will report to the designated site **or remote location** where they will be greeted by Insert appropriate position(s).

Key Steps:

- Insert appropriate position(s) communicates with the student and preceptor to ensure that a start date has been coordinated
- Insert appropriate position(s) provides students with the appropriate facilities access, **remote instruction access** and specific site information
- The site staff and clinical leadership is notified of the student start date by Insert appropriate position(s) prior to the student arriving

Play #8 –

Student Documentation & Reporting

Overview:

Documentation is key to assure accurate and organized reporting. **In this section, identify the position(s) that will take on the following responsibilities.**

The responsibilities are as follows:

- Compile student documentation to ensure vital information is collected for reporting and tracking of students
- Ensure that all student files are compliant
- Track students currently completing placement within organization
- Report to Leadership regularly to update on student specific information

Template for Tracking -

Student Name	School	Discipline	Degree	Site	Preceptor	Anticipated Rotation Dates	Onsite / Remote
Amanda Schiessl	CCSU	Behavioral Health	LMFT	East Windsor Middle School	Dariush Fathi	8/31/2020 - 5/1/2021	On-site

Template: Use the answers to the above questions to fill in the template

Insert appropriate position(s) compiles all of the student and placement documentation as to ensure compliance. Insert appropriate position(s) tracks students currently at the organization. Insert appropriate position(s) updates appropriate Leadership on current students during a regularly scheduled meeting.

Key Steps:

- Insert appropriate position(s) collects student information on:
 - **Actual start date**
 - **Personal Info**
 - **Location**

- Preceptor
- End Date
- Insert appropriate position(s) will create a custom report to be distributed to Leadership on current students on a quarterly basis
- **Appropriate leadership will participate in regularly scheduled meetings of the ‘Student & Trainee’ committee will occur on a quarterly basis to review students/schools**

Play #9 –

Off-boarding

Overview:

Off-boarding student(s) is critical to a strong training program and sustaining good relationships with students. Ensuring the collection of feedback is vital to evaluating your process and identifying process improvement measures. **In this section, identify the position(s) that will take on the following responsibilities.**

The responsibilities are as follows:

- Collect equipment from students
- Terminate student access to the assigned site **or remote platforms**
- Notify the appropriate departments of the student’s departure
- Collect feedback from the student regarding their experience at your organization
- Organize the feedback and report to the Leadership to ensure implementation of appropriate process improvement

COVID 19 UPDATE-

Through the COVID 19 pandemic across the nation, this role will requires additional responsibilities as follows:

- **Recommending a one month evaluation in addition to mid-year and final evaluation as to effectively monitor the program during the COVID pandemic**
- **Recommend sharing feedback with leadership and adapting program as needed**

Template: Use the answers to the above questions to fill in the template

The student experience ends with Insert appropriate position(s) collecting all property which was in use by the student for the duration of assignment. Insert appropriate position(s) assures that all appropriate departments are notified of the student’s departure. The preceptor will assure the final evaluation of the student is sent to the school. Insert appropriate position(s) will send out a questionnaire for the student to complete regarding their experience.

Key Steps:

- Two weeks prior to assignment completion, Insert appropriate position(s) will email student a final survey to gain insight on total student experience
- Insert appropriate position(s) assures the following have been collected from student:
 - ID badge
 - Laptop if applicable
 - Any equipment borrowed
- Insert appropriate position(s) notifies appropriate department for network access to be turned off
- Insert appropriate position(s) notifies appropriate staff that student has ended their assignment

Sample Question for Evaluation –

For the following questions, please rate your satisfaction related to different aspects of the experience.

Please rate each of the following statements on a five-point scale where (1) is Very Poor and (5) is Excellent

	Very Poor (1)	Below Average (2)	Average (3)	Above Average (4)	Excellent (5)
The communication with CHCI prior to starting the experience	<input type="radio"/> Very Poor (1)	<input type="radio"/> Below Average (2)	<input type="radio"/> Average (3)	<input type="radio"/> Above Average (4)	<input type="radio"/> Excellent (5)
The onboarding to company policies and regulations prior to the experience	<input type="radio"/> Very Poor (1)	<input type="radio"/> Below Average (2)	<input type="radio"/> Average (3)	<input type="radio"/> Above Average (4)	<input type="radio"/> Excellent (5)

The formal welcome that you received to CHCI Very Poor (1) Below Average (2) Average (3) Above Average (4) Excellent (5)

The training provided on CHCI technology Very Poor (1) Below Average (2) Average (3) Above Average (4) Excellent (5)

The equipment provided to complete your placement Very Poor (1) Below Average (2) Average (3) Above Average (4) Excellent (5)

Facilities access and space for the experience Very Poor (1) Below Average (2) Average (3) Above Average (4) Excellent (5)

The degree to which your experience met the learning objectives established by your college/university for this experience Very Poor (1) Below Average (2) Average (3) Above Average (4) Excellent (5)

The attention of the preceptor/supervisor to your needs as a student/trainee Very Poor (1) Below Average (2) Average (3) Above Average (4) Excellent (5)

The off-boarding and exit process (evaluation, wrap up, etc.) Very Poor (1) Below Average (2) Average (3) Above Average (4) Excellent (5)

Based on your experience as a student/trainee, please identify your level of agreement on the following statements:

	Disagree	Neutral	Agree	Not Applicable
I was trained to a high performing model of care	<input type="radio"/> Disagree	<input type="radio"/> Neutral	<input type="radio"/> Agree	<input type="radio"/> Not Applicable
I gained the opportunity to increase my confidence and competence in my area of practice	<input type="radio"/> Disagree	<input type="radio"/> Neutral	<input type="radio"/> Agree	<input type="radio"/> Not Applicable
I was provided the opportunity to be exposed to the needs of	<input type="radio"/> Disagree	<input type="radio"/> Neutral	<input type="radio"/> Agree	<input type="radio"/> Not Applicable

Based on your experience as a student/trainee, please identify your level of agreement on the following statements:

	Disagree	Neutral	Agree	Not Applicable
underprivileged populations				
I would consider CHC as a place to work/practice following completion of my education and training	<input type="radio"/> Disagree	<input type="radio"/> Neutral	<input type="radio"/> Agree	<input type="radio"/> Not Applicable
I would recommend CHC to my friends and colleagues as a place to work/practice/train	<input type="radio"/> Disagree	<input type="radio"/> Neutral	<input type="radio"/> Agree	<input type="radio"/> Not Applicable
I experienced a high quality, educational experience	<input type="radio"/> Disagree	<input type="radio"/> Neutral	<input type="radio"/> Agree	<input type="radio"/> Not Applicable