Training the Next Generation:
Health Professions Students Roadmap (Part 2)

Wednesday November 12th, 2025
1:00-2:00pm Eastern / 10:00-11:00am Pacific

1

Continuing Education Credits (CEUs)

Through MWHS, the Weitzman Institute can award continuing education credit (CEUs) to physicians, nurse practitioners, pharmacists, nurses, physician associates/assistants, dentists, psychologists, social workers, and dietitians. Please note that continuing education credit requirements differ by state, jurisdiction, and licensing agency. It is your responsibility to confirm if your licensing/credentialing agency will accept the credits offered by Weitzman Education activities.

To learn more, please visit:
https://education.weitzmaninstitute.org/content/about-us

Disclosure

- With respect to the following presentation, there has been no relevant (direct or indirect) financial relationship between the party listed above (or spouse/partner) and any for-profit company in the past 12 months which would be considered a conflict of interest.

- The views expressed in this presentation are those of the presenters and may not reflect official policy of Community Health Center, Inc. and its Weitzman Institute.

- We strive to create a respectful and welcoming learning environment. If anything in today's session makes you feel uncomfortable, please let us know via email at nca@chc1.com.

- We are obligated to disclose any products which are off-label, unlabeled, experimental, and/or under investigation (not FDA approved) and any limitations on the information that we present, such as data that are preliminary or that represent ongoing research, interim analyses, and/or unsupported opinion.

- This project is supported by the Health Resources and Services Administration (HRSA) of the U.S. Department of Health and Human Services (HHS) as part of an award totaling $550,000 with 0% financed with non-governmental sources. The contents are those of the author(s) and do not necessarily represent the official views of, nor an endorsement, by HRSA, HHS, or the U.S. Government. For more information, please visit HRSA.gov.

MORE THAN WHAT WE DO. IT'S WHO WE DO IT FOR.

Learn More at mwhs1.com

MOSES/WEITZMAN Health System
Always groundbreaking. Always grounded.

Community Health Center, Inc.
A leading Federally Qualified Health Center based in Connecticut.

ConferMED
A national eConsult platform improving patient access to specialty care.

The Consortium for Advanced Practice Providers
A membership, education, advocacy, and accreditation organization for APP postgraduate training.

National Institute for Medical Assistant Advancement
An accredited educational institution that trains medical assistants for a career in team-based care environments.
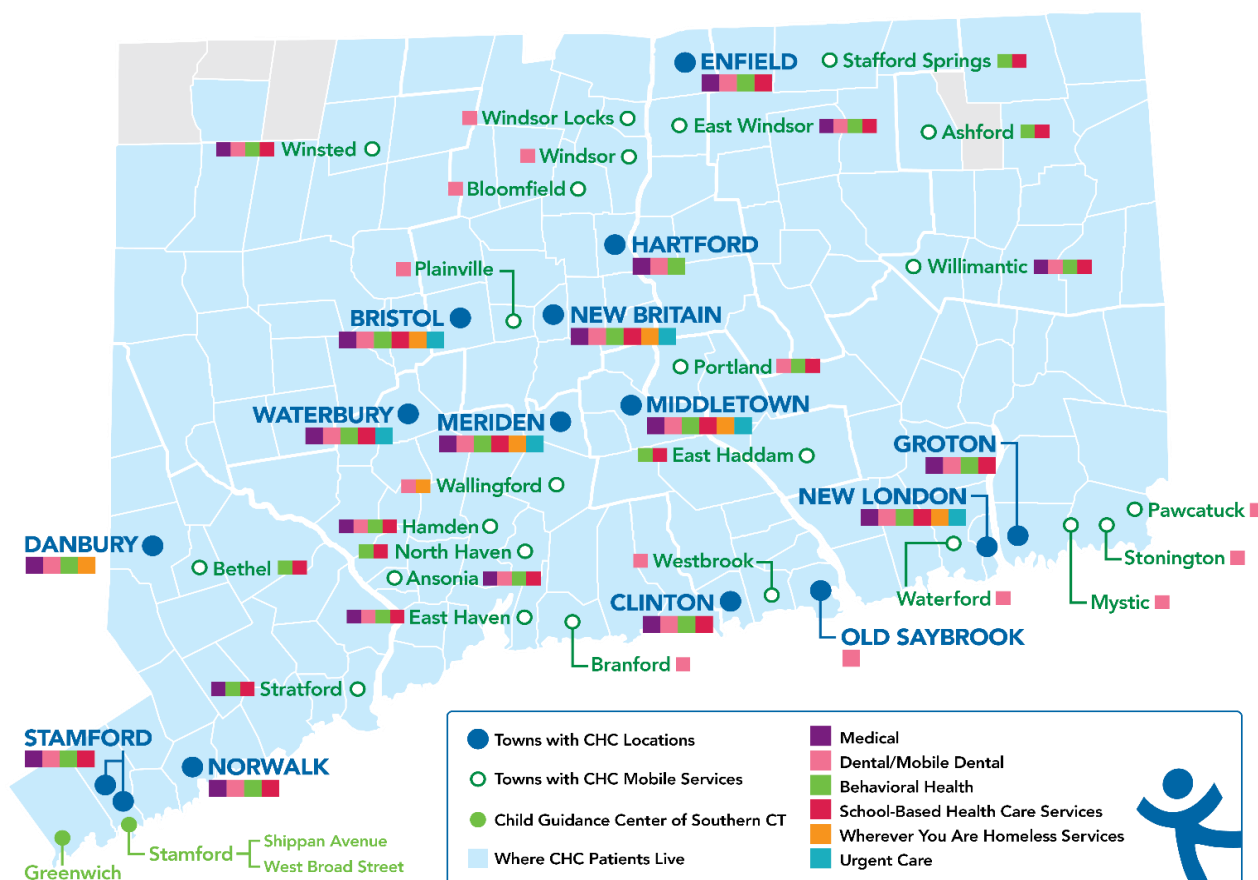
The Weitzman Institute
A center for innovative research, education, and policy.

Center for Key Populations
A health program with international reach, focused on the most vulnerable among us.

Locations & Service Sites

Legend:
- ● Towns with CHC Locations
- ○ Towns with CHC Mobile Services
- ● Child Guidance Center of Southern CT
- Where CHC Patients Live
- ■ Medical
- ■ Dental/Mobile Dental
- ■ Behavioral Health
- ■ School-Based Health Care Services
- ■ Wherever You Are Homeless Services
- ■ Urgent Care

THREE FOUNDATIONAL PILLARS

| 1 Clinical Excellence | 2 Research and Development | 3 Training the Next Generation |

Overview

- ◉ Founded: May 1, 1972
- ◉ Staff: 1,400
- ◉ Active Patients: 150,000
- ◉ Patients CY: 107,225
- ◉ SBHCs across CT: 152

Year	2022	2023	2024
Patients Seen	102,275	104,917	107,225

5

National Training and Technical Assistance Partners (NTTAP)
Clinical Workforce Development

Provides **free** training and technical assistance to federally funded health centers and look-alikes across the nation through webinars, activity sessions, communities of practice, trainings, publications, and more!

To learn more, please visit https://www.weitzmaninstitute.org/nca.

Amanda Schiessl

Chief of Staff
Moses/Weitzman Health System

Project Director and Co-PI
National Training & Technical
Assistance Partners (NTTAP)

Meaghan Angers

Senior Program Manager
National Training & Technical
Assistance Partners (NTTAP) on
Clinical Workforce Development

Learning Objectives

1 Understand best practices for assessing your organization's capacity for hosting health professions students

2 Gain foundational for onboarding and off-boarding health professions students

3 Explore next steps for building a sustainable health professions student training program at your health center

Health Professions Student Training Roadmap

Step 2: Assessing Capacity

Aspects of Assessing Organizational Capacity

➢ Assess and approve your organization's clinical staff on their availability to precept

➢ Maintain an available preceptor capacity report

➢ Communicate with available preceptors regarding their interest

➢ Assess secondary review for available space, day(s) of the week

➢ Formally match preceptors to students

Organizational Capacity

- Capacity changes rapidly in primary care and must be assessed regularly, at a minimum of a few months before each semester starts for your academic partner programs.

- At some point, it is likely that you will be unable to informally manage the incoming volume of requests in an efficient, orderly, and safe way that ensures success for students, health center staff, and the academic partner.

  ➢ This is the situation CHCI found itself in around 2017. After decades of various clinical and organizational leaders managing the process, we had to admit that we just could not continue without real focus and structure.

Preceptor Criteria to Consider:

- Length of time in the organization

- Percentage of FTE

- Business title

- Site location

- Performance (e.g. unlocked notes every week)

- Other commitments (e.g. leadership role, faculty positions)

- Personal factors (e.g. in school, personal leave)

- Fit for teaching/training

Identifying willing and available preceptors

➢Email to Assess Preceptor's Initial Interest

Box 14.5. Sample Communication Plan to Clinical Staff on Initial Interest to Precept

Hi **Provider Name**,

As we start preparing for the **semester**, I wanted to check in on your thoughts about taking a **discipline** student this **semester**. If you have any interest in working with a student, please let me know. Thanks in advance for your time and consideration!

Warmest regards,

Organization Clinical Leader

Conducting Secondary Review

- Although you may have a willing and available preceptor, a quality student training experience requires:

  ➢ Adequate space on site (e.g. desk, set-up, parking)

  ➢ Adequate training time to EHR

  ➢ Set up in systems (e.g. email, EHR accounts)

  ➢ Equipment (e.g. laptop)

  ➢ Adequate onboarding to organization

MCR Health, Inc.
Assessing Organizational Capacity

Assessing Organizational Capacity

At MCR Health we focus on several distinct types of rotations.
Each type is individually assessed related to the agreements.

- Lake Erie College of Medicine Regional Campus Osteopathic School
- Lake Erie College of Medicine Dental School
- Manatee Memorial Hospital Family Medicine Residency
- HCA Blake Hospital Continuity Clinic
- HCA Blake PM&R Residency
- FAMU Pharmacy
- Ad Hoc - Nursing, Pharmacy Tech, Nurse Practitioner and Physician Assistant programs

LECOM MEDICAL STUDENTS

	1	2	3	4	5	6	7	8	9	10	11	12	13
Athena Training Dates	5/26 to 6/20/25	6/23 to 7/18/25	7/21 to 8/15/25	8/18 to 9/12/25	9/15 to 10/10/25	10/13 to 11/7/25	11/10 to 12/5/25	12/8 to 1/02/26	1/05 to 1/30/26	2/02 to 2/27/26	3/02 to 3/27/26	3/30 to 4/24/26	4/27 to 5/22/26
	CEE	Psych	IM1	IM2	IM3	Sur1	Sur2	NON MCR	OB	Elective	FP	Peds	Vac
	CEE	Vac	Psych	IM1	IM2	IM3	Sur1	Sur2	NON MCR	OB	Elective	FP	Peds
	CEE	Peds	Vac	Psych	IM1	IM2	IM3	Sur2	Sur1	NON MCR	OB	Elective	FP
	CEE	FP	Peds	Vac	Psych	IM1	IM2	IM3	Sur2	Sur1	NON MCR	OB	Elective
	CEE	Elective	FP	Peds	Vac	Psych	IM1	IM2	IM3	Sur2	Sur1	NON MCR	OB
	CEE	OB	Elective	FP	Peds	Vac	Psych	IM1	IM2	IM3	Sur1	NON MCR	Sur2
	CEE	NON MCR	OB	Elective	FP	Peds	Vac	Psych	IM1	IM2	IM3	Sur2	Sur1
	CEE	Sur2	NON MCR	OB	Elective	FP	Peds	Vac	Psych	IM1	IM2	IM3	Sur1
	CEE	Sur2	Sur1	NON MCR	OB	Elective	FP	Peds III	Vac	Psych	IM1	IM2	IM3
	CEE	IM1	Sur1	Sur2	NON MCR	OB	Elective	FP	Peds	Vac	Psych	IM3	IM2

Assessing Organizational Capacity

Peds

	Preceptor	Site	Address
Week One	Assoye Belony, PA	Lawton Chiles	1515 26th Avenue E
Week Two	Lina Rengifo, MD/Cecilia Ladines, MD	Whole Child	6040 53rd Ave E Bra
Week Three	Jacqueline Garavito, MD	Lawton Chiles	1515 26th Avenue E
Week Four	Jacqueline Garavito, MD	Lawton Chiles	1515 26th Avenue E

Peds II

	Preceptor	Site	Address
Week One	Mary Walter, APRN	Dr. George Van Buren	712 39th Street W Br
Week Two	Danilo Zuniga, MD	Fruitville	170 N. Lime Ave Sar
Week Three	Mary Walter, APRN	Dr. George Van Buren	712 39th Street W Br
Week Four	Danilo Zuniga, MD	Fruitville	170 N. Lime Ave Sar

Peds III

	Preceptor	Site	Address
Week One	Jasmin Jordan, MD	Edgar Price	12271 US Hwy 301 N
Week Two	Jasmin Jordan, MD	Edgar Price	12271 US Hwy 301 N
Week Three	Jasmin Jordan, MD	Edgar Price	12271 US Hwy 301 N
Week Four	Jasmin Jordan, MD	Edgar Price	12271 US Hwy 301 N

MCR HEALTH

Assessing Organizational Capacity

2025-2026 BLAKE IM Continuity Clinic

6/30-7/6	7/7-7/13	7/14-7/20	7/21-7/27	7/28-8/3	8/4-8/10	8/11-8/17	8/18-8/24	8/25-8/31	9/1-9/7	9/8-9/14	9/15-9/21	9/22-9/28
C1	C2	C3	C4	C5	C1	C2	C3	C4	C5	C1	C2	C3

9/29-10/5	10/6-10/12	10/13-10/19	10/20-10/26	10/27-11/2	11/3-11/9	11/10-11/16	11/17-11/23	11/24-11/30	12/1-12/7	12/8-12/14	12/15-12/21	12/22-12/28
C4	C5	C1	C2	C3	C4	C5	C1	C2	C3	C4	C5	C1

12/29-1/4	1/5-1/11	1/12-1/18	1/19-1/25	1/26-2/1	2/2-2/8	2/9-2/15	2/16-2/22	2/23-3/1	3/2-3/8	3/9-3/15	3/16-3/22	3/23-3/29
C2	C3	C4	C5	C1	C2	C3	C4	C5	C1	C2	C3	C4

3/30-4/5	4/6-4/12	4/13-4/19	4/20-4/26	4/27-5/3	5/4-5/10	5/11-5/17	5/18-5/24	5/25-5/31	6/1-6/7	6/8-6/14	6/15-6/21	6/22-6/28
C5	C1	C2	C3	C4	C5	C1	C2	C3	C4	C5	C1	C2

6/29-7/5
C3

C1	Alkowatli	PGY3			C2	Thomas	PGY2			C3	Frett	PGY3
	Skowronek	PGY1				Hodge	PGY1				Gomez	PGY1

C4	Kuriakose	PGY3			C5	Karzoun	PGY2
	Ho	Prelim				Shah	PGY1

Assessing Organizational Capacity

The Clinical Affiliation Specialist is responsible for evaluating the capacity of clinical preceptors for ad hoc requests. This includes regular communication with the Director of Graduate Medical Education and the relevant Clinical Chiefs to assess provider readiness. Based on feedback from leadership, the Specialist will reach out to providers to gauge their interest in precepting.

The vetting process includes reviewing the provider's full-time equivalent (FTE) status and tenure within the organization. If a provider is both eligible and willing, a follow-up review will assess available space, preferred days of the week, and time availability. Once confirmed, the preceptor will be formally matched with a student.

Assessing Organizational Capacity

Student acceptance is determined by several factors, including:
- Duration of the rotation
- Preceptor availability and any specific requirements
- Availability of space at the assigned site
- Alignment with organizational standards
- Adequate notice and timing of the proposed start date
- Additional considerations for student acceptance may include:
  - ❖ Alignment with the student's mission and goals
  - ❖ Potential for future employment at MCR
  - ❖ Personal requests from current employees
  - ❖ Current clinical staffing needs

Assessing Organizational Capacity

What it comes down to in the end:

- **Know your providers – working relationship**
- **Know the sites – make-up of clinical and support staff**
- **TRACKING, TRACKING and TRACKING!!**
- **COMMUNICATION!!**

QUESTIONS?

Step 3: Onboarding

Health Professions Student Training Roadmap

Onboarding: Key Elements

➢Communication

➢Human Resources

➢Information Technology

➢Training

➢Facilities and Operations

Initiating the Onboarding of a Student

CHC Onboarding Requirements

To
Cc

📄 BH onboarding packet updaed 2019.pdf
484 KB

📄 Non-Employee Manual.pdf
3 MB

📄 Infection Control Requirements Worksheet student Final.2020.pdf
698 KB
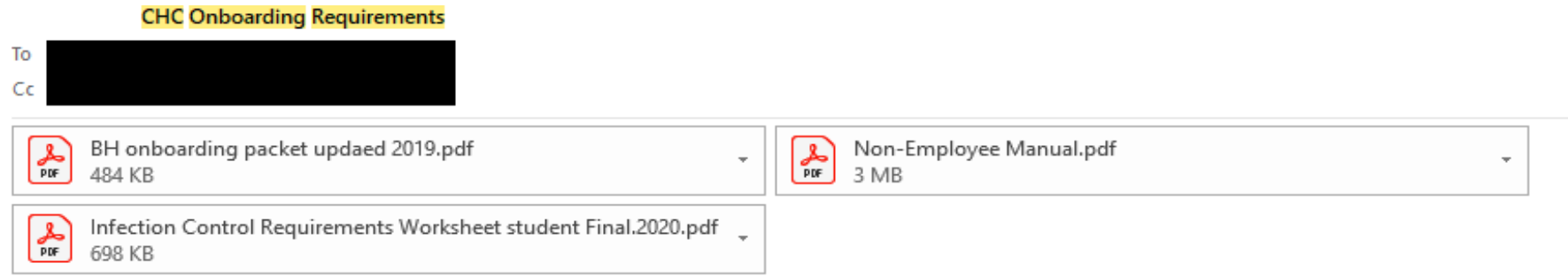
Good Morning Taylor,

I hope this email finds you well. Below are the onboarding requirements for you to start your placement with Dr. Fathi this year.

1. We will need you to complete the paperwork found at this link in order to begin your placement at CHC. The attached manual will help you complete the paperwork.

2. Please complete this Behavioral Health Packet and scan the copy directly to me at cunninj@chc1.com. The DCF check can take a few weeks to process, so please be sure to submit this at your earliest convenience.

3. Proof of vaccinations, including flu, MMR, TB, Varicella, and a Physical within the last year that certifies you as healthy and free of

Communication with Students

Effective communication from the initial point of contact is key to a quality student experience

➢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

➢Initiate onboarding process with Information Technology, Facilities, and Training

Important Onboarding Best Practices

➢ Email student and school representatives – include student preceptor on communications as well

➢ Incorporate students into existing HR processes if possible (e.g. contingent worker onboarding)

➢ Strive to schedule health record training as close to start date as possible

➢ Remember details like dress code, ID badges, parking, directions, etc.

➢ Add the students to the internal distribution list

Managing Expectations with Student/Affiliations

- 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.

Information Technology (IT) for Students

- Ensure a process/pathway for communicating necessary information to IT is established
  - ➢ Preceptor identifies the student's technological needs and proceeds with IT process for account and equipment set up
  - ➢ Access and needs vary varies based on discipline, remote/onsite, preceptor etc

- Work together with IT to determine the necessary time needed to set up accounts and hardware
  - ➢ Note: We request a 2-week notice to set up accounts and hardware properly.

- Maintaining and managing IT equipment (e.g. keep them secure, no stickers, no liquids or foods near them)

- Provide instructions for VPN access

Student Laptop Process

- For students logging in remotely from their own laptop, the training team coordinates a time for students to meet with them for Electronic Health Record (EHR) training.
- Ensure students are able to access their account successfully with their account prior to their placement.
- Students are required to keep laptops on-site – they are not able to take them.
  - For on-site student laptops, ensure there is a standardized sign-in and sign-out process.
- Preceptor goes through HR Business Partner to submit termination tickets to IT, so students do not have account access beyond the final date of their placement.

IT Support

- We do provide IT Support to students via email and/or phone – same process as staff.

- Once the user is established (e.g. logged in, has laptop), they can call the service desk for support as needed.

- **Verification process** for all employees, including students, should be in place so they can be vetted before receiving IT support.

Training the Student Key Steps

➤ Training on the electronic health record policies, standards, and functions of your organization and appropriate clinical discipline is important to setting the foundation for the student experience.

➤ Identify the appropriate training needs for each student

➤ Account for access needs to effectively train but ensure appropriate conversations with IT on access

➤ Collaborate with the appropriate departments to identify the next available technical training

Training the Student Key Steps Cont.

➢Utilize existing training schedules and opportunities to abbreviate for students (e.g. attend first hour of three hours employee training)

➢Coordinate with student(s) regarding accommodating training prior to start

➢Providing students with dates/times and ensure that they understand that if unable to attend will impact start date

➢Do not accommodate one offs

Student Arrives or Begins Virtually

IMPORTANT: Assure that key personnel/departments have been notified in advance, and all equipment/space is prepared for student arrival.

➢ Coordinate appropriate facilities access (e.g. badges) and space (e.g. desk, chair) for student prior to arrival

➢ Communication details to the student (e.g. time, parking)

➢ Ensure student has all details, access and training on joining remote prior to start

➢ Communicate with site operations and clinical leadership

➢ Ensure that the site has appropriate equipment for the student

Key Takeaways

- Prior to the student's start date, conduct a final checklist, including:
  - ✓ Coordinate appropriate facilities access (e.g. badges) and space (e.g. desk, chair) for student prior to arrival
  - ✓ Ensure HIPAA training has been completed
  - ✓ Schedule EHR training (if appropriate for student role)
  - ✓ Communicate details to the student (e.g. time, directions/parking, dress code, student laptop process)
  - ✓ Notify the site operations and clinical leadership
  - ✓ Add the student to internal distribution lists.

Step 4: Off-boarding

Health Professions Student Training Roadmap

Off-Boarding: Key Elements

Key Elements:

➢ Collect the data, use it, and report on it

➢ Student and preceptor experience

➢ Post-Experience Survey

➢ Reporting data to clinical leadership

Student Documentation & Reporting Overview

- As the student completes their experience – ensure any needed documentation and/or reporting is completed.

- This information is vital for continual organizational improvement.

- Key Steps:
  - ➤ Student Coordinator monitors submission of supervision reports by students, if applicable.
  - ➤ Regularly scheduled presentations of the 'Student & Trainee' committee will occur on a quarterly basis to review students/schools, report on pressing student matters, and update the committee on new and upcoming ventures in student-facing needs.

Capturing Evaluation Before Student Leaves

- Compile student survey response to ensure vital information is collected for reporting and tracking of students
  - ➢ Keep Organized
  - ➢ Develop accurate archive

- Ensure that all student files are compliant

- Verify all student supervision logs are accounted for

Template for Student Documentation & Reporting

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

*Encourage collecting contact information for students (e.g. email)

Tracking Students During Placement

➢Track students currently completing placement within organization

➢Report to leadership regularly to update on student specific information

➢Crucial to assessing ongoing capacity

Off-Boarding Overview

- Off-boarding is a critical part of the student training program in order to maintain positive relationships with the students and academic partners.
- Off-boarding responsibilities include:
  - Notify the appropriate department of students' departure
  - Terminate students' access to the clinical sites, to the EHR, and/or other remote platforms
  - Collect equipment that belongs to your health center from the student
  - Collect feedback from student, and faculty if appropriate, regarding their experience at your health center either through surveys or discussions
  - Organize feedback and present to leadership team to evaluate your program and improve as needed
  - Assign outstanding EHR documentation to supervisor

Steps for Successful Survey Distribution

- Distribute survey to student's academic email within a week of the student's last day of their placement at your organization
  - CC Program Coordinator or Field Instructor on communication as well
  - Communicate the importance of survey completion to all parties involved, to encourage a response

- Follow up on any pending off-boarding items (equipment, preceptor evaluations, etc.)

- Ensure no double barreled questions for surveys

- Be sure to share results with your leadership and make improvements where needed

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

Statement	Very Poor (1)	Below Average (2)	Average (3)	Above Average (4)	Excellent (5)
The communication with CHCI prior to starting the experience	O	O	O	O	O
The onboarding to company policies and regulations prior to the experience	O	O	O	O	O
The formal welcome that you received to CHCI	O	O	O	O	O
The training provided on CHCI technology	O	O	O	O	O
The equipment provided to complete your placement	O	O	O	O	O
Facilities access and space for the experience	O	O	O	O	O

Statement	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	O	O	O	O	O
The attention of the preceptor/supervisor to your needs as a student/trainee	O	O	O	O	O
The off-boarding and exit process (evaluation, wrap up, etc.)	O	O	O	O	O

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

Statement	Disagree	Neutral	Agree	Not Applicable
I was trained to a high performing model of care	O	O	O	O
I gained the opportunity to increase my confidence and competence in my area of practice	O	O	O	O
I was provided the opportunity to be exposed to the needs of underprivileged populations	O	O	O	O
I would consider CHCI as a place to work/practice following completion of my education and training	O	O	O	O
I would recommend CHCI to my friends and colleagues as a place to work/practice/train	O	O	O	O
I experienced a high quality, educational experience	O	O	O	O

Sample Survey Results from CHCI

- Fall 2023 Semester: Evaluation sent to 95 students/residents with a response rate of ~53% (n=50).

  - ➤ Respondents were from the following disciplines: NP students, MA students, Dental Hygiene students, Chiropractic students, MD students, and MSW students.

- Most respondents marked "above average" or "excellent" to the below questions:

Question	Very Poor	Below Average	Average	Above Average	Excellent	No response:
The degree to which your experience is currently meeting the learning objectives established by your college/university for this experience	0%	2%	10%	24%	62%	1
The onboarding to company policies and regulations prior to the experience	2%	4%	14%	28%	50%	1
The equipment provided to complete your placement	2%	10%	24%	14%	40%	5

Sample Survey Results from CHCI Cont.

- Last Spring 2023, 20% of respondents rated our equipment as "very poor" or "below average." Specifically, from dental hygiene students (5 total).

- This Fall 2023, only 12% of respondents rated the equipment as "very poor" or "below average". Specifically, from dental hygiene students (3 total).

- Overall, less "very poor" and "below average" ratings than usual responses, averaging at around 0-12% rating for each question – strong improvement from previous semesters!

Next Steps

Scaling Up: Assemble a team!

- Create a process map of the student experience from start to finish

- Develop a comprehensive "playbook" to solidify the program and process to use as a base for continual improvement

- Working towards creating a strong quality improvement infrastructure

CHCI clinical microsystem goes to work on designing a system.

Health Professions Student Training Playbook

Purpose: Tool to promote a highly organized, streamlined, and efficient process that supports the needs of the organization, the academic/training institutions, and the students

Link to CHCI's Health Professions Student Training Playbook

Link to the Playbook Template

COMMUNITY HEALTH CENTER, INC.

EDUCATION AND TRAINING FOR THE NEXT GENERATION

Healthcare Students Playbook
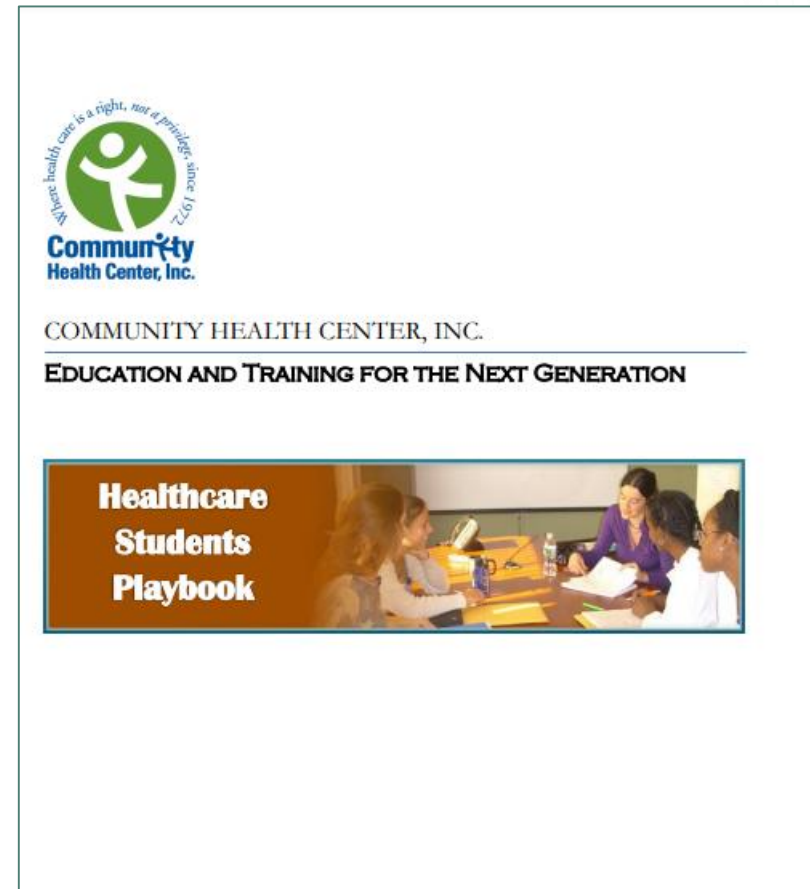
Playbook Overview

Play 1: Partnership Approval and Communications with Schools

Play 2: Affiliation Agreement Management

Play 3: Student Capacity

Play 4: Initiating the Onboarding of a Student

Play 5: Communication with Student

Play 6: Student is Trained

Play 7: Student Arrives

Play 8: Student Documentation and Reporting

Play 9: Off-boarding

Questions?

Wrap-Up

Explore more resources!

National Learning Library:
Resources for Clinical Workforce Development

Health Center
Resource Clearinghouse

https://www.weitzmaninstitute.org/ncaresources

https://www.healthcenterinfo.org/

Contact Information

For information on future webinars, activity sessions, and communities of practice: please reach out to nca@chc1.com
or visit https://www.chc1.com/nca