Office of Clinical Education

Student Manual

Updated 2022, February 4

Phone: 317.962.5048
Email: *OCE@iuhealth.org*
Website: *https://iuhealthcpe.org/OCE*
Office Hours: M - F from 0800 - 1630
★ Federal Holidays are Observed ★

TABLE OF CONTENTS

 This symbol at the top right of the page will take you back to the Table of Contents.

INTRODUCTION TO THE OFFICE OF CLINICAL EDUCATION

What is the Office of Clinical Education (OCE)?

OCE serves as a centralized clearinghouse for all advanced practice provider (APP) students (NPs, PAs, SRNAs, and AAs) enrolled in programs with IU Health's partner schools. APP students looking to find clinical preceptors at IU Health, whether IU Health-employed or not, will need to go through OCE.

OCE is also the office that manages the education affiliation agreements for all of IU Health. APP, MSN, DNP and PhD students coming to IU Health for learning experiences are required to complete onboarding items so that they are informed of policies, procedures, and other expectations intended to keep patients and protected health information safe.

Why does OCE exist?

In 2014, IU Health Executive Leadership recognized the need for a single, centralized Office of Clinical Education to track and coordinate the numerous learners coming into IU Health's system, and to better understand where advanced provider students are training. (Source: IU Health Strategic Planning, Providing Opportunities for Learner in the IU Health System, Team SBAR April 2014).

What do APP student applicants need to know?

There is an application process with hard deadlines. Visit OCE's website *https://iuhealthcpe.org/OCE*

1. Students (employees or not) need to register on OCE's website and *create an account*. Registration is a one-time activity.

2. Students <u>must complete all</u> their student profile. Potential preceptors can view the student's profile for selection. There are multiple users of the registration fields. Incomplete profiles will keep the student's information from transitioning into OCE's database therefore, OCE won't be able to "see" the student there.

3. <u>Students need to apply for each and every semester</u> they intend to be precepted at IU Health until they graduate or are no longer looking to be precepted by an IU Health provider.

What else do students need to know?

Students are not allowed to reach out to providers on their own before, during or after the preceptor matching process. Students wanting clinical experiences at IU Health are expected to go through OCE and follow the process that has been outlined for them in the affiliation agreement with schools.

What is OCE's contact information?

Email your inquiries to *OCE@iuhealth.org* (preferred) or call our office at 317.962.5048. Team members may also go to *https://team.myiuhealth.org/* and enter "OCE" in the search bar to find a link to OCE's webpage or add a shortcut link to their *Favorite*.
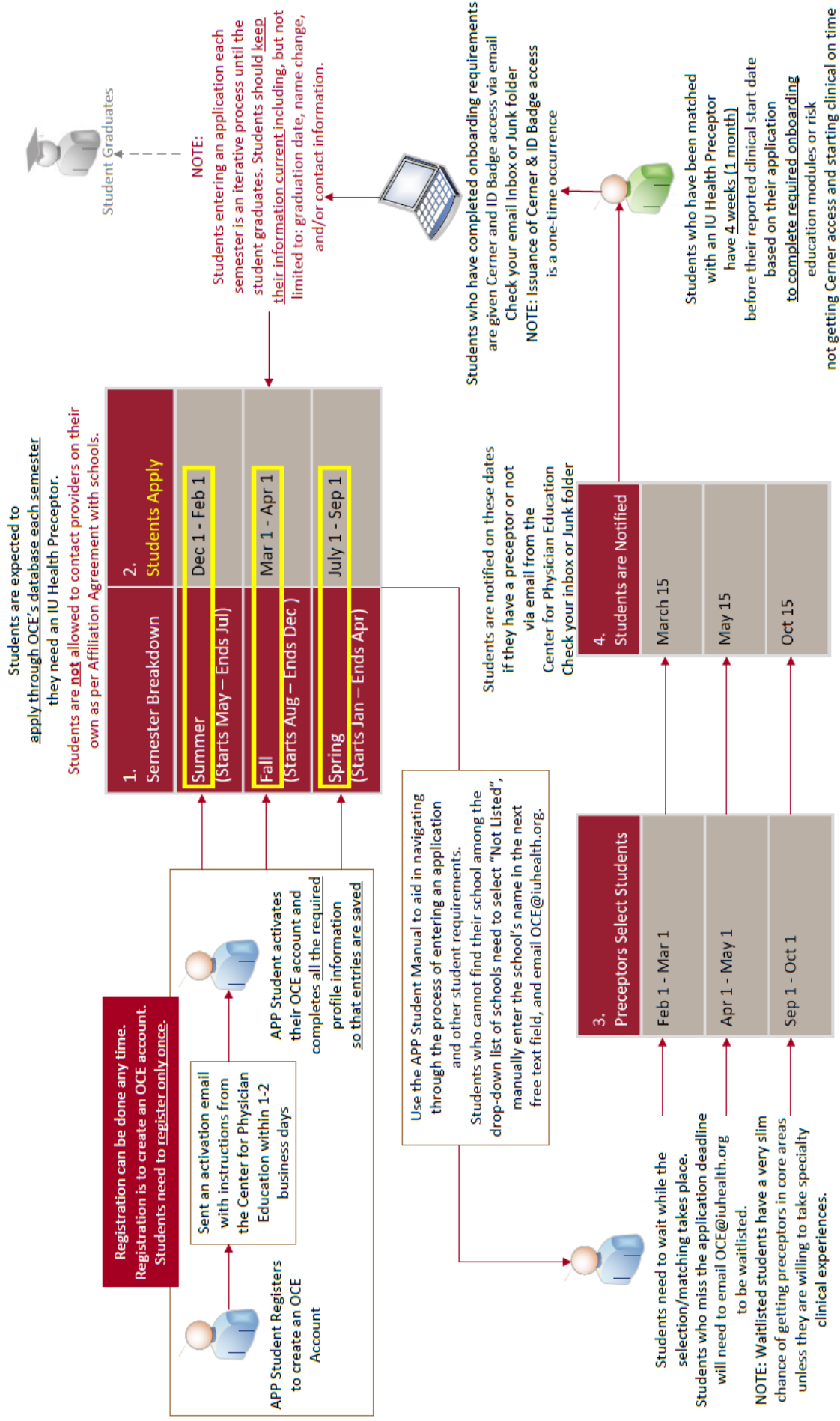
What kind of information should the APP student include in their email?

Include the following information: school, program type, start and end dates of your clinical rotation, total number of clinical hours and all other pertinent information.

How do find out if my school has an active Affiliation Agreement with IU Health?

Email OCE@iuhealth.org.

Map of APP Student's Journey Through IU Health's Office of Clinical Education (OCE)

OCE2022.02.09cg

Student Graduates

NOTE:
Students entering an application each semester is an iterative process until the student graduates. Students should keep their information current including, but not limited to: graduation date, name change, and/or contact information.

Students are expected to apply through OCE's database each semester they need an IU Health Preceptor.

Students are **not** allowed to contact providers on their own as per Affiliation Agreement with schools.

1. Semester Breakdown	2. Students Apply
Summer (Starts May – Ends Jul)	Dec 1 - Feb 1
Fall (Starts Aug – Ends Dec)	Mar 1 - Apr 1
Spring (Starts Jan – Ends Apr)	July 1 - Sep 1

Students who have completed onboarding requirements are given Cerner and ID Badge access via email
Check your email Inbox or Junk folder
NOTE: Issuance of Cerner & ID Badge access is a one-time occurrence

Students who have been matched with an IU Health Preceptor have 4 weeks (1 month) before their reported clinical start date based on their application to complete required onboarding education modules or risk not getting Cerner access and starting clinical on time

Registration can be done any time.
Registration is to create an OCE account.
Students need to register only once.

Sent an activation email with instructions from the Center for Physician Education within 1-2 business days

APP Student activates their OCE account and completes all the required profile information so that entries are saved

APP Student Registers to create an OCE Account

Use the APP Student Manual to aid in navigating through the process of entering an application and other student requirements.
Students who cannot find their school among the drop-down list of schools need to select "Not Listed", manually enter the school's name in the next free text field, and email OCE@iuhealth.org.

Students are notified on these dates if they have a preceptor or not via email from the Center for Physician Education
Check your inbox or Junk folder

4. Students are Notified
March 15
May 15
Oct 15

3. Preceptors Select Students
Feb 1 - Mar 1
Apr 1 - May 1
Sep 1 - Oct 1

Students need to wait while the selection/matching takes place.
Students who miss the application deadline will need to email OCE@iuhealth.org to be waitlisted.
NOTE: Waitlisted students have a very slim chance of getting preceptors in core areas unless they are willing to take specialty clinical experiences.

4

REGISTRATION: STARTING POINT FOR STUDENTS NEW TO OCE'S PROCESS

Registration Process Step-by-Step

1. Go to *https://iuhealthcpe.org/OCE* to sign up using a multi-factor authentication process.

2. **It is preferable when signing up as a new user to use your IU Health- *or* School-issued email address as your primary email**. Automated emails will be sent to the primary email provided and will be sent from the *Center for Physician Education* (CPE) rather than the OCE email address.

3. Select the *"Advanced Provider Student"* role to get the correct list of required modules. Click "Next" and complete **all** required fields.

4. Complete *all* fields on the "Personal Information" page. Select your preferred region for the clinical site location by drag-and-drop and rank your order of preference. Be advised that due to the number of clinical requests for a specific region, you may not necessarily end up with your first choice.

1. First-time users of the MFA process, including students who have registered before MFA went live, click "I do not have an account".

4. *All fields are required*. Check the box "I'm not a robot".

2. You will be asked to create an account.

3. You will receive a text. Enter the 6-digit number to move forward with the registration process.

5. Set & confirm your OCE password.

What do I select for these items under "Personal Information" when I register?

OCE's database is shared by other users. Therefore, there are many options to choose from which may lead to confusion. <u>APP students need to select the following options for the following required entries</u>:

⇒ **Role** - select "*Advance Provider Student*" (this includes CNS students)

⇒ **Specialties** - select which specialty applies to you (i.e. Family Medicine—if an FNP student or CNS students select "*CNS student*") to get the correct list of onboarding education modules

⇒ **Credentials** - select "<u>*Other*</u>" as it currently applies. NP students cannot yet select any NP role.

⇒ **Locations** - select "<u>*OCE*</u>" since that will be your primary location in the shared database and so that your information will transition to the OCE side. This is not the location(s) you work or will be going to.

⇒ **Email** - if you are an IU Health employee, you need to use that as your primary email then use your school's email as your secondary. If you are not an IU Health employee, use your school-issued email as your primary. IU Health employees will be using the same username/password to log into OCE as their Cerner account.

APPLICATION PROCESS

General Application Information

♦ Students who are eligible to apply to be matched with an IU Health clinical preceptor during the dates indicated on OCE's website. Do not wait till the last minute (i.e., the last day of open application) especially if it is your first time applying to avoid missing the deadline due to "technical difficulties".

1. Semester Breakdown	2. Students Apply	3. Preceptors Select Students	4. Students are Notified
Summer (Starts May – Ends Jul)	Dec 1 - Feb 1	Feb 1 - Mar 1	March 15
Fall (Starts Aug – Ends Dec)	Mar 1 - Apr 1	Apr 1 - May 1	May 15
Spring (Starts Jan – Ends Apr)	July 1 - Sep 1	Sep 1 - Oct 1	Oct 15

♦ Students must register within the timeframes provided (2nd column). Once the application period ends, students will not be able to enter an application for the upcoming semester and must email OCE. <u>Students who apply late will be waitlisted</u>. No requests to be waitlisted will be accepted past the dates when students are notified (4th column).

♦ Students will be notified of their preceptorship status (matched or declined) on the dates indicated on the 4th column. The automated email notification will come from the *Center for Physician Education* rather than OCE. Also check your *Junk Email* folder if you cannot find the email after the posted date.

♦ Completing an application with OCE does not guarantee placement with an IU Health provider due to the number of applicants.

♦ Notify *OCE@iuhealth.org* immediately to withdraw an application.

IT IS IMPORTANT TO COMPLETE THE INFORMATION TO YOUR PROFILES

1. Button to click to edit your student information such as updating what clinical experiences you've completed.

2. Button to click to edit your personal information such as your graduation date.

MY REQUEST & ASSIGNMENT LIST

1. Edit Student Information   **2.** Edit Personal Information

3. Please Provide Student Information Before Applying

3. Button will **_not_** allow you to apply for clinical placement until you have reviewed 1 & 2 to make sure all requested information has been completed and saved...then the "Apply for Clinical Placement" button will appear.

APPLICATION PROCESS STEP-BY-STEP

1. Once an account has been created, you can log into *https://iuhealthcpe.org/OCE* and click on "Apply for Clinical Placement" to enter an application for the upcoming semester.
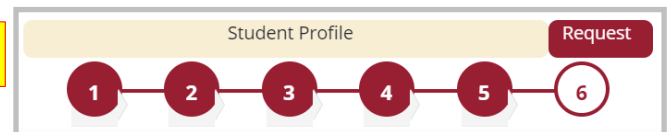
1. Apply for Clinical Placement

2. Complete the "Student Profile" questions. Click "next" at the bottom of the page to move forward.

2. Next >

3. This is a visual cue to let you know where you are in the application process.

3. Student Profile   Request
1 2 3 4 5 6

Students are limited to only 4 clinical applications per semester, so prioritize your requests.

Students cannot apply for two duplicate or the same clinical experience twice.

4. If a previous clinical preceptor has agreed to precept you for another semester, select the "Yes" button to the question, "Has someone agreed to precept you?", and enter the preceptor's name and email.

5. If your clinical coordinator usually finds and assigns the preceptor for you, select the "Yes" button to the question, "Will your coordinator match you?". Notice that you will not be able to select both "Yes" buttons, therefore, you must only select one or the other.

6. If no one has agreed to precept you and if your clinical coordinator does not find the preceptor for you, select both "No" buttons. Both "No" buttons can be selected if this is what applies in your situation.

1 2 3 4 5 6

Has someone agreed to precept you? **4.** Yes: ○ only if there is an identified preceptor   No: ● **6.**

Will your coordinator match you? **5.** Yes: ● No preceptor yet but the Coordinator is working on it   No: ○

Coordinator's Name: Student enters Coordinator's name   Coordinator's Email: Student enters Coordinator's email address

7. After completing an application, be sure to click "Save Clinical Application" before you leave the site or enter another application.

7. Save Clinical Application

REVIEW/UPDATE INFORMATION & CLINICAL REQUESTS

Reviewing your application

MY REQUEST & ASSIGNMENT LIST

Reviewing your clinical application is as simple as logging in to OCE's database. Look for "MY REQUEST & ASSIGNMENT LIST" to view the status of the activities you have entered in OCE's database. After applying, check this area to make sure your application was properly saved.

Updating your Student Profile

Edit Profile Information

Your "Student Profile" information will include the categories listed on the screenshot below. This information will be viewable to prospective preceptors or included in the email OCE sends to a preceptor on your behalf. Make yourself stand out from all other applicants.

MY REQUEST & ASSIGNMENT LIST			
Edit Profile Information		Edit Personal Information	
Apply for Clinical Placement			

Approved Assignments

Dates	Hours	Preceptor	Status
06/29/2020 - 08/14/2020	20		Active Assignment
06/29/2020 - 08/14/2020	85		Active Assignment
06/29/2020 - 08/14/2020	20		Active Assignment
08/17/2020 - 10/02/2020	125		Upcoming Assignment

Request List

Dates	Hours	Experience	Status	Edit
01/11/2021 - 02/26/2021	125		Awaiting Approval	⚙
03/15/2021 - 04/30/2021	100		Pending	⚙

Completed

Dates	Hours	Preceptor

Profile Information

Request & Assignment Information	Profile Information

Profile Information

Past Clinical Experiences	**Previous Work Experiences**
Professional Passions & Motivations	**Personal Passions & Motivations**
Professional Strengths	**Personal Strengths**
Skill Focus	**Availability**
☐ History Taking ☐ Billing & Coding	☐ Monday ☐ Day Shift
☐ Physical Exam ☐ Diagnosis	☐ Tuesday ☐ Night Shift
☐ Documentation ☐ Plan of Care	☐ Wednesday
☐ Results Interpretation ☐ Procedures	☐ Thursday
☐ EMR	☐ Friday
Other Skill Information:	Other Availability Information/Dates not Available:
Program Faculty Adviser Name and Contact Information	**Other Information**

Updating/Editing your Personal Information

Edit Personal Information

It is good practice to review and update your student profile. Update your student profile by clicking on "Edit Personal Information" and add completed experiences to your profile—including any name change with the previous name place in parenthesis "()". **Students who do not update their profile, especially graduation date, may find their Oracle ID# terminated/graduated resulting in the discontinuation of their access to the EMR**. When this happens, reinstating EMR access could take weeks to resolve.

Withdrawing an Application

Once logged into your OCE account, scroll down to the "MY REQUEST & ASSIGNMENT LIST" to view any of the clinical assignments currently in "Pending" status. Click on the gear icon that corresponds with the clinical request you want to edit. Click "Withdraw Request" and "Save Changes". The application you have withdrawn will now appear under the "Withdrew, Decline, etc." list.

However, if the status of your application is no longer under the "Pending" area (i.e., in "Active" or "Future"), email *OCE@iuhealth.org* immediately to request for the manual withdrawal of that application.

Request List

Dates	Hours	Experience	Status	Edit
01/01/2021 - 05/01/2021	160	Family Medicine	Pending	⚙
01/01/2021 - 05/01/2021	160	Pediatrics	Pending	⚙
01/01/2021 - 05/01/2021	55	Orthopedics	Pending	⚙

Withdrew, Declined, etc.

Dates	Hours	Experience	Status
06/01/2020 - 08/01/2020	53	Dermatology	Withdrew

Save Changes	Withdraw Request

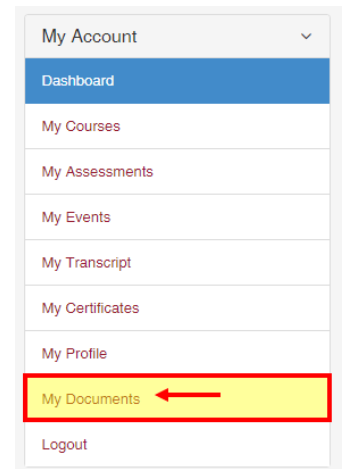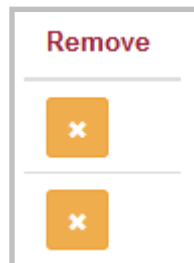# UPLOADING DOCUMENTS TO YOUR STUDENT ACCOUNT

This page will walk you through the process of uploading documents, such as a resume or other materials, you may want to share with a provider. Some preceptors have asked for a copy of the student's resume prior to accepting him or her for preceptorship. Some have even asked to interview the student prior to agreeing to the match. Make yourself stand out from the rest of the student applicants by creating a strong student profile. Think of this portion of your student application as filling out an application for a job. Focus on your strengths in the areas of motivation, clinical experience, work history, and communication skills.

1. Sign into OCE's website: *https://iuhealthcpe.org/OCE*

2. Click on the "Education Portal" at the top of the page:

HOME	ABOUT	COURSE CATALOG	RESOURCES	FAVORITES	EVENTS	QUICK LINKS	**EDUCATION PORTAL**	APP STUDENTS	❷ HELP

3. Click to select "My Documents" from the menu on the right side of the page.

4. Click on the "Upload Document" tab. Then click "Browse" to find the file you want to upload from your computer.

5. Find the file you want and then click "Upload Document"

6. In the event that you have uploaded the incorrect document or would like to remove a document, click on "Current Documents" and select the "X" to remove the document.

My Account ⌄
Dashboard
My Courses
My Assessments
My Events
My Transcript
My Certificates
My Profile
My Documents ←
Logout

Remove

This section only applies to STUDENTS NOT EMPLOYEES OF IU HEALTH

The non-IU Health employed student's clinical coordinator/adviser or school's compliance officer will be required to provide a copy of the completed Clinical Student Validation (CSV) form and will need to sign this document. Make sure you submit the required documents to your school in a timely manner so that they, in turn, can submit the CSV to OCE accordingly.

1. Immunization Records including:

   - Proof of COVID-19 Vaccination or Exemption form
   - Flu Vaccine or Exemption form

2. American Heart Association BLS card
3. Background check plus the student-signed written consent allowing the school to share this information with IU Health.
4. Drug test
5. Proof of personal health insurance (insurance card)
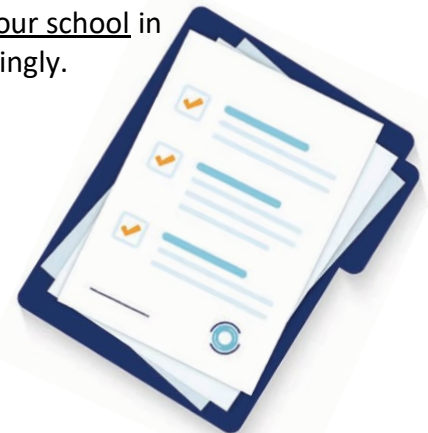
★**Do not submit any of these documents to OCE.** *It must be submitted and signed by your school.*★

REQUIRED ITEMS TO BE COMPLETED & OCE ANNOUNCEMENTS

Students are required to complete acknowledgement forms and learning modules. These items can be accessed through *OCE's website* by logging in and clicking on the "Education Portal".

The first page you will see will ask you to "Update Your Information". Edit any information needed, such as your graduation date, or emergency contact information, or whatever is pertinent to update on this page.
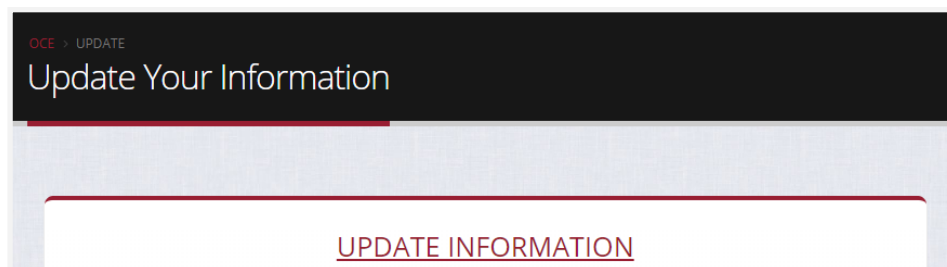
When you click to select "Education Portal", you will see a list of "Courses to Complete" on the left side of the page. Students are required to complete a basic package of modules that are tied to the Advanced Provider Student role. Students who go to IU Health North or West Hospitals will be required to complete additional modules. On this page, you may also view documents you have uploaded.

Students, regardless of employment status with IU Health, are required to complete the assigned modules before student-role Cerner access is activated. Below is an example of what you may see on your "Education Portal".
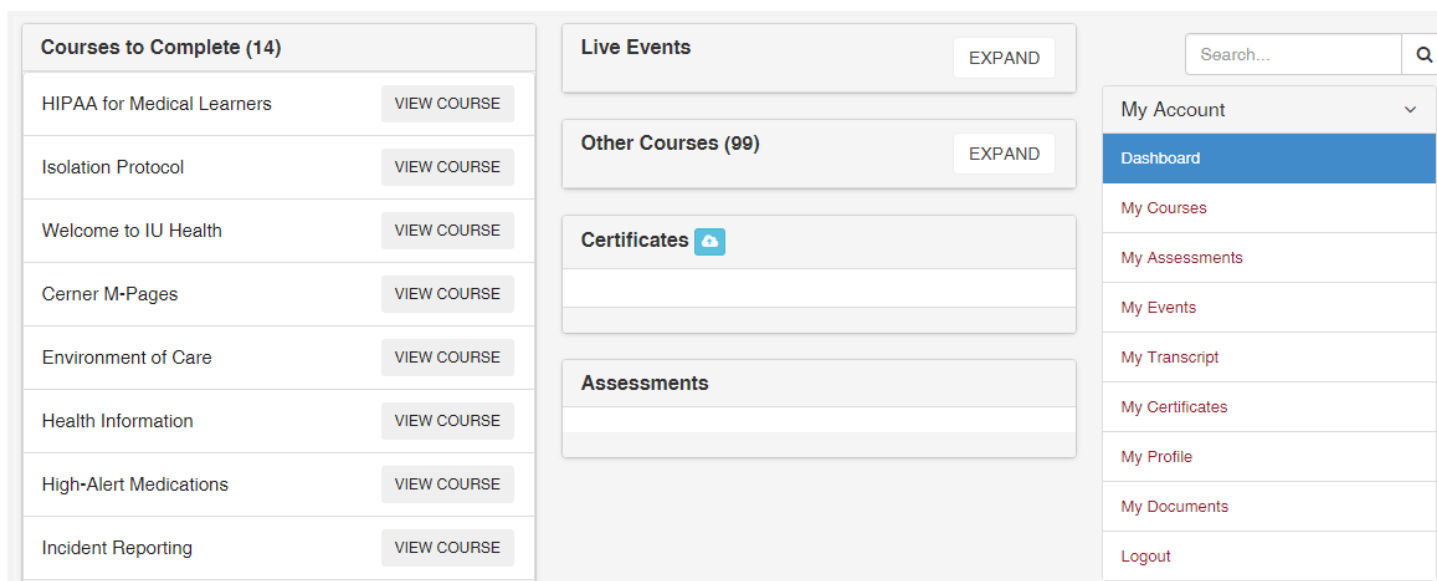
Announcements will also be posted on OCE's website. So, visit OCE's website every now and then for any announcement updates. Below is an example of the announcement during the start of the pandemic.

The OCE, in conjunction with IU Health's Academic Affairs, is allowing students who had an approved/planned summer clinical to resume May 27 as long as the provider and their clinical site has the capacity to receive learners. Resumption of clinical experiences will reside with the preceptor. Notification of fall preceptorships will be on June 29.
Review OCE COVID-19 Guidelines here
Review and Sign the COVID Acknowledgement Here

IU HEALTH & OCE'S EXPECTATIONS OF APP STUDENTS

1. **Students must complete the *Data Stewardship Agreement* (or Responsibility Statement) required by IU Health prior to the start of their clinical experiences**. Be advised that the timely completion of the Responsibility Statement will trigger the start of the process for IU Health's Human Resource (HR) department. Next, Identity & Access Management (IdAM or data security) will begin their process to allow EMR access. Timely completion of onboarding requirements is also imperative. In all, this process can take up to 6 weeks for those students going through OCE for the first time.

   Students whose preceptors go to IU Health North and/or West Hospitals will be required to complete additional modules specific to those clinical locations. Avoid showing up for clinical without the correct EMR access. IU Health employees should not use their work-issued username and password for these 2 reasons:
   (1) EMR access is generated by IU Health's Identity and Access Management (IdAM) to be role- based. Do not get caught (Haystack) accessing patient information outside of the role-view you have been given permission to see either as an employee or as a student;
   (2) You will not have the APP views without the correct permission.

2. **Students must complete all required onboarding requirements (i.e., education modules) <u>at least 1 month (or 4 weeks) before the clinical start date indicated on their application or risk *NOT* starting clinical on time.</u>**

3. Students must wear an IU Health-issued/approved ID badge at all times during clinical.

4. After the preceptorship has been confirmed by the email notification, students should contact their preceptor to plan the clinical schedule. **Students should provide the preceptor with their clinical advisor's name, contact information, and any school paperwork pertinent to their learning outcomes before the first day of clinical**. The clinical advisor's name and contact information should also be entered in OCE's database.

5. Students must exhibit the "3 Ps": **P**rofessional. **P**repared. **P**unctual. Students must come prepared with all needed equipment and learning tools (i.e., stethoscopes, laptops if asked to bring one, etc.). Provide your preceptor with your school's learning objectives for the current rotation and a copy of the course syllabus.

6. Professional attire and attention to personal hygiene and grooming are expected. In any clinical site where patient contact is part of the clinical experience, students should wear appropriate lab coats or attire as directed by faculty and/or preceptor.

7. Students should only see patients delegated to them by their preceptor.

8. Students are expected to discuss documentation specifics with the preceptor. If policy permits student documentation on the patient record, the student should sign his/her name and provider relationship.

9. Students are expected to contact their clinical adviser and preceptor if any concerns arise during the clinical rotation.

10. Students are expected to read all the information provided to them by OCE as they are intended to aid in navigating through the preceptorship process successfully.

11. ***Students <u>should not contact providers on their own</u> looking for a preceptor at any time (before, during, or after) the OCE matching process*. This is one of the student expectations clearly stated in the affiliation agreement between IU Health and partner schools.**

At IU Health, hundreds of At IU Health, hundreds of thousands of activities take place within its electronic medical record and other systems that contain patient information.

To help protect patients' health information and records, the IU Health Privacy team has a tool that helps monitor IU Health system use. The system is called *Haystack* and is used to track user activity in many of the IU Health systems that contain patient electronic health information (ePHI). *Haystack* will issue alerts when out-of-ordinary behaviors are identified by the system which is based on team members' previous activities, job codes and other facts. The Privacy team reviews the alerts to determine if the access was appropriate; in some cases, a leader will be contacted to help in determining if the access was appropriate or not.

Team members who have access to IU Health systems should only use the system access for a business reason (treatment, healthcare operations or billing).

⇒ Never look at your own record or account information. Instead, visit MyIUHealth.org to view your personal record or billing information. You can also obtain health information from your healthcare provider or request medical records the Health Information Management. You can contact Revenue Cycle Services Customer Service for billing documentation.

⇒ Never look at records or account information of family members, friends, neighbors, coworkers or others without a business reason.

⇒ Never look at records or account information of celebrities or people who have been in the news.

⇒ Never look at record or account information out of curiosity of celebrities or people who have been in the news.

⇒ Never look at record or account information out of curiosity.

Reference: IU Health (2021, June 28). HIPAA reminder: honor patient privacy.

Retrieved from HIPAA Reminder: Honor patient privacy (myiuhealth.org)

Mindful Planning

Create a great first impression on your first day of clinical!

02/2022

Office of Clinical Education

Clinical Student Prep Checklist

	Things to do once you have been assigned a preceptor:	Comments:
☐	Complete learning modules and other onboarding requirements	
☐	Contact provider to arrange clinical schedule and exchange contact information. Include your clinical adviser's contact info.	
☐	Ask about the appropriate dress code for the office, where to park, and where to enter.	
☐	Ask about office etiquette or other group norms that you should know about.	
☐	Provide the preceptor with paperwork required by the school (i.e., evaluation) with clear instructions.	
☐	Contact the HelpDesk (317.962.2828) to get your personal device (laptop) initially configured to access IU Health apps including Cerner. *Your actual Cerner access will be emailed to you once you have completed all the necessary requirements along with your badge access information.*	
☐	Email OCE@iuhealth.org if your preceptor plans on taking you to multiple locations so that the requirements you are assigned matches the location(s) you will be going to.	
☐	Get your student ID badge.	

Preparing for the *first* day of clinical:

☐	Program your GPS to the correct location.	
☐	Set your alarm to allow margin for—morning hygiene routine, food/drink (caffeine), traffic, road delays, constructions, distance, weather, etc.	
☐	Pack your lunch.	
☐	Charge your laptop.	
☐	Bring your stethoscope.	
☐	Bring a notepad with highlighter and a pen (or two).	

Office of Clinical Education

Trouble Shooting Guide

Trouble Shooting: Calculating Clinical Hours

Students are responsible for calculating the number of clinical hours needed for each application entered on our website. Students whose school semester terms don't closely match OCE semester terms may have to apply for two clinicals in the same OCE semester or may have to split one school term's needed hours across two OCE semester calendar periods. The best way to calculate this is by deciding how many weeks of each school semester term fall into which OCE semester term.

Step 1: **Confirm the school term date range then compare to the number of weeks of each term with OCE's Semester Calendar.**

Hint: It will help to consult a year-at-a glance calendar of the affected semester(s), so you can mark and/or count weeks.

As you can see in the example above, there are two areas where the school semester (or term) doesn't fully fall within (or match) OCE's semester breakdown. These become **decision points** for you before you apply. Below are guiding questions to help you make your decision.

Sample Areas for Decision-Making on Your Part (see circled #1 and #2 above):

Guiding Question 1: *Can I complete all my needed hours for School's spring semester in 16 weeks, instead of 17 weeks?*

> **Your decision is "*Yes*".** Follow the "**Action plan**" below and just apply for the spring semester within the OCE time frame (end date for your clinical application will be April 30th, not May 4).
>
> > **Action plan**: Enter your application in OCE but do not go past the maximum end date options for the OCE semester (i.e. April 30, July 31 or December 31— depending on which semester you are applying). Calculate the maximum clinical experience hours you need based on the full total number of weeks it will take you to complete this clinical.

Your decision is "*No*". If the time is **no more than two weeks (maximum)** past OCE's maximum set Semester End Dates, follow the "**Action plan**" below. If the time exceeds more than two weeks past OCE's maximum set Semester End Dates, refer the example illustrated by **Guiding Question 2**.

Action plan: After completing your application using the last allowed end date shown for the OCE semester period (i.e. April 30, July 31 or December 31). Then email OCE and ask if our office can manually adjust your Application's End Date. For the spring semester above, you would be asking OCE to adjust the April 30 end date you entered to the May 4th end date.

Note: The website is programmed not to allow students to enter end dates outside the OCE Semester Term. If you try, the system should give you an error message. Many students, thinking they are done, will exit too quickly and miss that the website is warning them the system cannot accept the data the student entered. It will alert you to what fields need to have an "acceptable" input. Carefully review your information and ensure that your application is saved before leaving the site. **Always enter start and end dates on the website within the OCE Semester term limits**. Email OCE if you need our assistance to alter an application date range outside OCE's Semester Term limits.

Example application:

Name	Dates	Experience/Setting/Hours	Pref Region	School & Program
@iuhealth.org Grad Date:12/20/2020 Request ID: 8811 ⚑	2021/01/03 - 3021/04/30	Family Medicine Primary Care/Outpatient 144 Hours	Central(Metro)	University of Cincinnati Family Nurse Practitioner

Example email sent to OCE:

↩ Reply ↩ Reply All ➥ Forward

Mon 8/3/2020 11:16 PM

Can you please adjust my spring semester application end date

⟩ Office of Clinical Education

Hello OCE,

I am writing to you in regards to my spring semester Family Medicine (= experience type) application, with start date 1-3-2021 and end date currently listed as 4-30-2021. Could you please adjust the end from 4-31-2021 to 5-4-2021. If you have any questions, I can be reached at <enter email address associated with your OCE account> or you can call me at 317-555-5555.

Thank you,

(=student name)
Name of School Here
Name of Program Here

* Notice all the red text items in sample email above should be included and shall reflect student's individual needs/details.

Guiding Question 2: *Can I complete all my needed summer clinical hours within OCE's Summer semester term?* (Rationale: I will only have 13 weeks to complete all my clinical hours – even though my school's summer term is 16 weeks long)

> **Your decision is "*Yes*".** See the "**Action plan**" below (end date for your clinical application will be July 31st, not August 14).
>
> > **Action plan**: Enter your application in OCE but do not go past the maximum end date options for the OCE semester (i.e. April 30, July 31 or December 31- depending upon which semester you are applying). Calculate the maximum clinical experience hours you need based on the full total number of weeks it will take you to complete this clinical.
>
> **Your decision is "*No*".** Plan on submitting two applications for different semesters—one for the summer and one for the fall. You will _follow both "**Action plans**" below_ at the appropriate open application periods. Refer to OCE's perpetual calendar as posted on our website.
>
> > **Action plan 1**: Submit a summer semester application to cover the first 13 weeks of your school's summer term. In the Learning Experience (free text) field on your OCE summer application, explain that this is the first of two consecutive applications and you hope the prospective preceptor will also consider hosting you for the <enter specific number of remaining hours> from August 1 – August 14 <dates based on semester you are applying>
>
> > **Action plan 2**: *Submit a Fall semester application for the three remaining weeks of your school's summer term (Start date August 1 to End date August 14).
>
> > In the **Learning Experience** (free text) field on your OCE Fall Application, explain that this is a continuation of your summer semester clinical experience. If you have already discussed this with your summer semester preceptor and they have agreed to continue through to the August 14 end date of this second application, provide a brief explanation of this in the **Learning Experience** field with a similarly phrased sentence, "**My current preceptor**, <Preceptor's first and last name>, **has agreed to precept me**." This alerts OCE to watch for this provider to select you, during the student-preceptor match period.
>
> > *Another option is to combine the three remaining weeks of your School's Summer Semester with hours you may need for your School's Fall semester, especially if the clinical specialty you will be applying for is the same type of experience. You may even be able to use the same preceptor if they agree to continue precepting you. In this situation, instead of only having a 3-week clinical experience for the fall semester, you would actually have a 20-week fall semester application with OCE. If you take this option, see details on how to calculate needed clinical hours in section below with header: **For school calendars where two school terms are aggregated into one OCE semester application**.

Trouble Shooting: Calculating Clinical Hours (continued pt. 4)

Step 2: **Calculate how many hours you can do within your application time frame.**

Hint: **The Math** will typically be some form of this equation below. The yellow cells are for you to fill in the numeric value.

# of weeks in OCE semester	X	# of clinical hours to be completed each week	=	Total # of Clinical Hours applied for in OCE
	X		=	

For most courses, you will know the number of clinical experience hours you must complete or are limited to (i.e., specialty hours). The tricky part is when you have school semesters (or terms) that must be split in to two OCE semester applications or when you may have two short terms (i.e., some schools have two shortened terms during the summer instead just one summer term). In this case, you may have back-to-back classes in which the required number of clinical hours are for the same type of experience. Below are examples of these two types of semesters:

<u>EXAMPLE 1: School Terms are split into Two OCE Semester Applications.</u>

Based on **Question 2|You decided that you cannot complete all your needed summer clinical hours within OCE's Summer semester term** (above). You have decided to enter two separate clinical experiences. Your clinical advisor has informed you to complete 16 hours of clinicals each week for all 16 weeks of your summer term. Your 16 hours = two (2) 8-hour shifts per week.

<u>Scenario 1</u>: OCE Summer Semester Application (May 5 – July 31) = 13 weeks. See the math table below.

# of weeks in OCE semester	X	# of clinical hours to be completed each week	=	Total # Clinical Hours applied for in OCE
13 weeks	X	16 hours	=	**208 clinical hours**

<u>Scenario 2</u>: OCE Fall Semester Application (August 1 – August 14) = 3 weeks. See the math table below.

# of weeks in OCE semester	X	# of clinical hours to be completed each week	=	Total # of Clinical Hours applied for in OCE
3 weeks	X	16 hours	=	**48 clinical hours**

<u>EXAMPLE 2: School's calendar where two school terms are aggregated/combined into one semester application per OCE's calendar.</u>

In this example, your school has a Fall term from August 26 to November 22, roughly 13 weeks long.

The school also has a Winter Term after Thanksgiving and before Christmas, so from November 26 to December 22, basically 4 weeks.

As you can see, these two terms roughly equal the same number of weeks (16-17 weeks) as in Example 1 above. However, in this situation, the student is needing to complete 2 clinical experiences and possibly in 2 different clinical specialties. If the 2 clinical experiences are intended to be taken in succession and are both "Family Medicine" experiences, you could do both experiences with the same preceptor _if_ they are able to cover the number of clinical hours you are needing.

<u>Scenario 1</u>: You can only complete 8 clinical hours the first 4 weeks of the Fall semester (i.e., because you still have simulation lab each week for first 4 weeks).

After the first 4 weeks, you are expected to complete 16 hours per week for the remaining 9 weeks.

Additionally, your school expects you to complete 20 minimum to 24 maximum clinical hours each week.

Trouble Shooting: Calculating Clinical Hours (continued pt. 5)

Step 1 of the Math:

# of weeks in OCE's semester Fall, weeks 1-4	X	# of clinical hours to be completed each week	=	Clinical Hours
4 weeks	X	8 hours	=	**32 hours**

# of weeks in OCE's semester Fall, weeks 5-13	X	# of clinical hours to be completed each week	=	Clinical Hours
9 weeks	X	16 hours	=	**144 hours**

Step 2 of the Math: Calculating the Minimum and Maximum for your winter semester

# of weeks in OCE's semester Calculate the Minimum	X	# of clinical hours to be completed each week	=	Clinical Hours
4 weeks	X	20 hours	=	**80 hours** minimum

# of weeks in OCE's semester Calculate the Maximum	X	# of clinical hours to be completed each week	=	Clinical Hours
4 weeks	X	24 hours	=	**96 hours** maximum

Step 3 of the Math (to find *minimum* and *maximum* hour RANGEs to be applied for in OCE):

The Minimum hours calculation

Clinical Hours (Fall, Weeks 1-4) (highlighted in **green** in from Step 1 above)	+	Clinical Hours (Fall, Weeks 5-13) (highlighted in **orange** from Step 1 above)	+	Clinical Hours (**minimum**) applied for in OCE (highlighted in **blue** from Step 2 above)	=	Actual total number of clinical hours to be applied for in OCE
32	+	**144**	+	**80 hours** minimum	=	**216**

The Maximum hours calculation

Clinical Hours (Fall, Weeks 1-4) (highlighted in **green** from Step 1 above)	+	Clinical Hours (Fall, Weeks 5-13) (highlighted in **orange** from Step 1 above)	+	Clinical Hours (**maximum**) applied for in OCE (highlighted in **pink** from Step 2 above)	=	Actual total number of clinical hours to be applied for in OCE
32	+	**144**	+	**96 hours** maximum	=	**272**

On your application, enter the maximum hours calculation in the Clinical Hours filed, but **take note:**

Including an explanation of the **minimum** and the **maximum range** in the **Learning Experience** field may help you find a preceptor if he or she can provide you with the *minimum* amount but not necessarily the *maximum* amount you need. This may increase your chance of getting a preceptor.

Trouble Shooting: Set My Experience

"I can't see the patients that my preceptor can see in Cerner…"

If you have the correct access: username and password are both active, then you may need to make some set-up changes called "**Set My Experience Position**". You will want to match your preceptor's Cerner settings.

Clinical IS Job Aid

Topic:	**My Experience**	**Effective Date** Current Functionality
Facility:	**IU Health and Union Health Facilities**	**Contact** IU Health Help Desk helpdesk@iuhealth.org
Audience:	**Providers, Residents, and Clinicians with Provider View and My Experience**	

What:	*Describes the benefits of My Experience, illustrates the default view when opening a patient's chart and how to change the default view.*
Why:	*My Experience eliminates the need for users to choose a view initially upon logging into a patient's chart.*

Benefits of My Experience:

- All Providers and Residents have the same Provider View.
- Non-Uplifted Providers' and Residents' views default to Uplift Standard , eliminating the need to choose a view initially.

Uplift Standard View or Specialty View for Providers and Residents

When providers or residents log into a patient's chart, the view will default to either

Uplift Standard View…
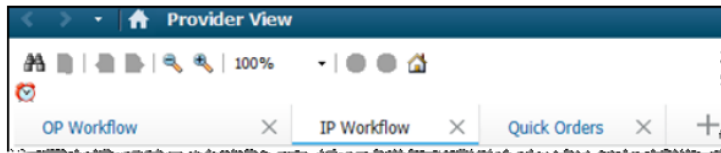
OR

the Specialty View
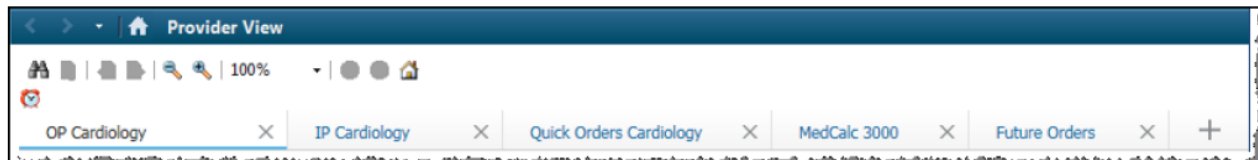
Note: The MPages are labeled as **Outpatient**, **Inpatient**, along with the **Specialty**. The MPage should default based on the **Encounter Type**.

Change the Existing View

Step	Action
1	Close the Patient chart.
	Note: The Patient chart **MUST** be closed or a new View **WILL NOT** be available.

Continued on next page

Strengthening Patient Care Through Excellence in Clinical IS Education
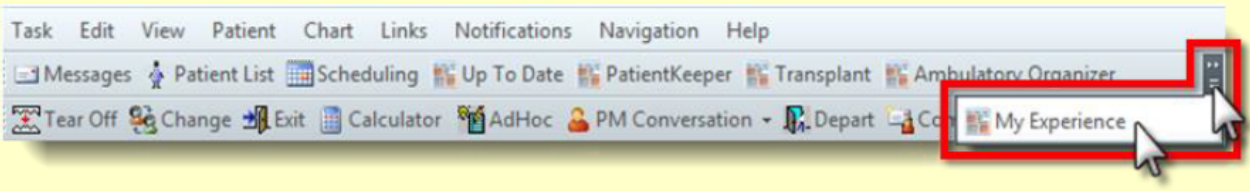
Clinical IS Job Aid

Change the Existing View (continued)

Step	Action
2	Click the **My Experience** button on the Task toolbar.
	Note: The My Experience button may not be forward-facing in the ToolBar. Click the ⟫ at the end of the View toolbar to view hidden options and click the My Experience button.
	Task Edit View Patient Chart Links Notifications Navigation Help 📧 Messages 👤 Patient List 📅 Scheduling 📋 Up To Date 📋 PatientKeeper 📋 Transplant 📋 Ambulatory Organizer ⟫ ⬇ Tear Off 🔄 Change ➡ Exit 🖩 Calculator 📋 AdHoc 👤 PM Conversation ▾ 📋 Depart 📋 Co 📋 My Experience
	The My Experience View Selection window displays. **My Experience** 🔍 📄 📄 📄 🔍 🔍 100% **My MPages Selection** For Tab: Provider View ○ Adolescent Med View ○ Allergy Peds View ○ Cardiology Peds View ③ ● Cardiology View
③	Select the **radio button** beside the **Specialty View** to be utilized.
4	Click the **Save** button.

Clinical IS Job Aid

Contact IUH Service Desk	**Effective Date**
helpdesk@iuhealth.org	Current Functionality

Advanced Practice Provider (APP) Student Sends Note to Preceptor for Endorsement

Topic: Advanced Practice Provider (APP) Student Sends Note to Preceptor for Endorsement

Facility: IU Health Facilities

Audience: APP Students and Preceptors

What: *This document provides a brief outline for the Advanced Practice Provider (APP) Student to preceptor note workflow.*

Why: *This workflow provides appropriate regulatory compliance to support the preceptor to sign notes written by APP Students.*

APP Student Workflow – Submit a Note to a Preceptor

Step	Action
1	Click the **Sign/Submit** button. *Students are required to choose a preceptor for verifying signature.*
2	Select a **preceptor** to submit the note to for endorsement. a. In **Dynamic Documentation (Dyn Doc):**

Continued on next page

Visit IU Health's IS Clinical Education Learning Site

Request 5525351   Advanced Practice Provider (APP) Student Sends Note to Preceptor for Endorsement v2.0 07-14-21   Page 1 of 3

23   02/2022

Step	Action
3	Click the **Submit** button (*there is no Sign button*). *When submitted by the APP Student, the note is placed in an* **(Unauth)** – *"Unauthenticated" – status, remains visible to other users in Workflow and displays a "Preliminary Report" heading when opened.*
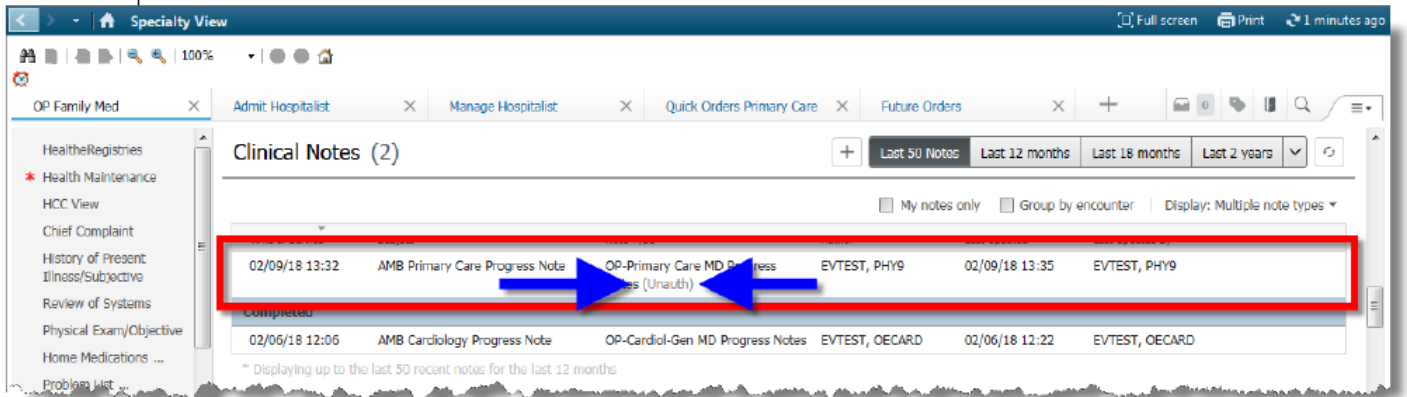
Note Statuses Meanings

- **"In progress"** – Author is still writing note.
- **"Unauthenticated"** – APP Student has submitted note to preceptor but needs to be authenticated.
- **"Completed"** – Authentication signature from preceptor has been completed.

Preceptor Workflow – Make Changes and/or Corrections to (Dyn Doc)
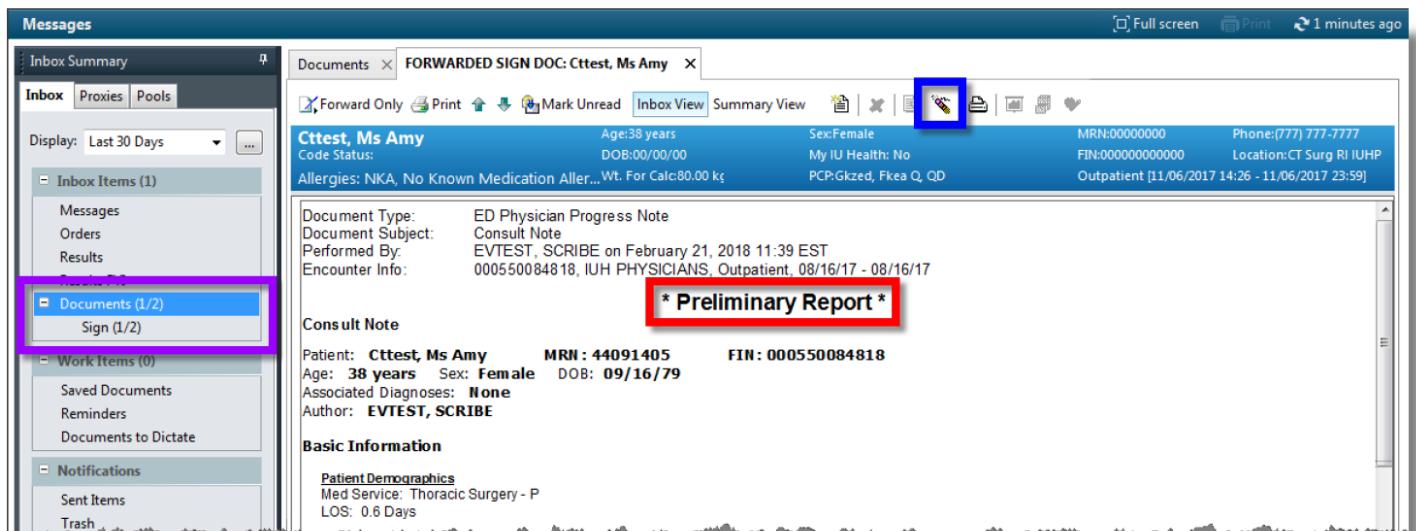
- When opened, the note header reads, "*** Preliminary Report ***."
- The preceptor receives the submitted note in Message Center, in the **Sign** folder(*as in the past*).
- The preceptor can now make direct **changes/corrections** to the note before signing.

Visit IU Health's IS Clinical Education Learning Site

Request 5525351   Advanced Practice Provider (APP) Student Sends Note to Preceptor for Endorsement v2.0 07-14-21   Page 2 of 3

24

02/2022

Important Notes:

- If the preceptor wants to addend (NOT edit) the note, they may still do so. They must sign the note and then modify with an attestation statement. The attestation statement and signature line will separated by a bold line and additional time stamp.

- **All notes must be signed off with the attestation statement** to satisfy documentation requirements for the patient visit

- If the preceptor wants to make edits and also attestation statement, they should follow the workflow below. The attestation statement and signature line will **not** be separated by a bold line and time stamp.

.attestM

.attestMedicalStudent *
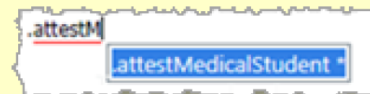
I personally evaluated the patient. I have reviewed, and, where needed, edited the note to assure that it is accurate, and agree with the content and plan as documented. |

Step	Action
1	Open the note in Message Center (*in the Sign folder*).
2	Click the **Modify** (🖹) button on the toolbar.
3	Take action, with these three options. a. **Edit** the document. b. **Add new content** to the document. c. Skip to Step 4 (Sign only).
4	**Sign** the document.

Visit IU Health's IS Clinical Education Learning Site

Request 5525351   Advanced Practice Provider (APP) Student Sends Note to Preceptor for Endorsement v2.0 07-14-21   Page 3 of 3

25   02/2022

Clinical IS Job Aid

Topic:	**Message Center Summary View Component**
Facility:	**IU Health and Union Health**
Audience:	**Cerner Message Center Users**

Effective Date
March 17, 2020

Contact
IU Health Help Desk
helpdesk@iuhealth.org

Why: *This change ensures that the workflow of all Cerner users matches the Summary View within Message Center for those users with Message Center.*

What: *The Summary View no longer links to Ambulatory Summary.*

For Example: **Dermatology Workflow**

The Best Care, Designed for You – Utilizing Excellence in Clinical IS Education

Task 1957515 (Linked to Release 10846)

Message Center Summary View Component v1.0 01-31-20 ALL;MESS

Effective Date: March 17, 2020
Page 1 of 2

26

02/2022

A Summary View is available within Message Center that allows the Provider to view the note and access the Workflow.

Note: The Summary View matches the Provider's Workflow View.

The Best Care, Designed for You – Utilizing Excellence in Clinical IS Education

| Task 1957515 (Linked to Release 10846) | Message Center Summary View Component v1.0 01-31-20 ALL;MESS | Effective Date: March 17, 2020 Page 2 of 2 |

27

02/2022

Troubleshooting Guide

405 Error message

Message appears when there is enough time gap of inactivity before the student completes and submits their request.

> **Oops! An Error Occurred**
>
> **The server returned a "405 Method Not Allowed".**
>
> Something is broken. Please let us know what you were doing when this error occurred. We will fix it as soon as possible. Sorry for any inconvenience caused.

"I did not get any messages from OCE."

Automated emails from OCE will only be sent to one email—the one you indicated as your primary at during registration. All autogenerated emails will come from the Center for Physician Education or CPE.

"Why can't I see any of my personal or student profile information?"

There are many other types of users to the registration fields. Double check all your profile fields to make sure nothing is incorrect or has been left blank. Your incomplete entries will prevent your information to flow to OCE.

"I missed the application deadline, what should I do?"

Students who missed the application deadline will be waitlisted. To avoid getting waitlisted, use countdown app or schedule a calendar reminder. Waitlisted requests will not be accepted past the student notification date (4th column on OCE's calendar). Do not procrastinate, miss the deadline, and risk getting waitlisted.

"I think I have the wrong set of modules…"

Advanced Provider Student

Module package assignment is based on the role and location you have selected when you first registered in OCE. Selecting a role other than "Advanced Provider Student" or location other than "OCE" will not link you to the correct list of modules. This is a shared database where other types of students are also being processed. Selecting the correct student role will avoid delays and additional, unnecessary work for you.

"It is already past the notification period but I have not received an email if I have a preceptor or not."

Students will receive notification about whether or not they have a preceptor for the clinicals they have applied for on the dates specified by OCE's calendar for final notification (4th column). If you did not receive an email, check the junk folder of your designated primary email with OCE. The email will come from the Center for Physician Education or CPE.

"Why did I get declined?"

These are the top 4 reasons students are declined:

1. No provider responded or could accommodate the student's request. Family Medicine/Primary Care, Pediatrics and Women's Health are the most requested.

2. The student did not apply in a timely manner (missed the application deadline) and was waitlisted.

3. There is no existing affiliation with their nursing school and IU Health. Affiliation agreements takes weeks to 2 months to process.

4. The student placed an inaccurate clinical request (e.g., entered inpatient but really wanted outpatient specifically)

Troubleshooting Guide

"Why don't I have Cerner access?."

Questions to ask yourself:
1. Did I apply for a clinical on time?
2. Did I complete the required forms and modules?

If you did not complete these requirements, then you were not given Cerner access. If your planned preceptorship with a provider was reported late or past OCE's notification date, chances are you won't get your Cerner access in time for the start of your planned clinical. Remember, it takes IU Health's HR, IdAM, and OCE departments about 6 weeks to process your Cerner access. OCE has no control over these timelines.

Students whose employment status with IU Health has changed will need to update their profile accordingly, in a timely manner, and email OCE as this type of status change will likely affect Cerner access and affiliation agreement coverage.

404 Error

Message appears when there is a broken link. It is good practice to take a screenshot of the error message with the URL included.
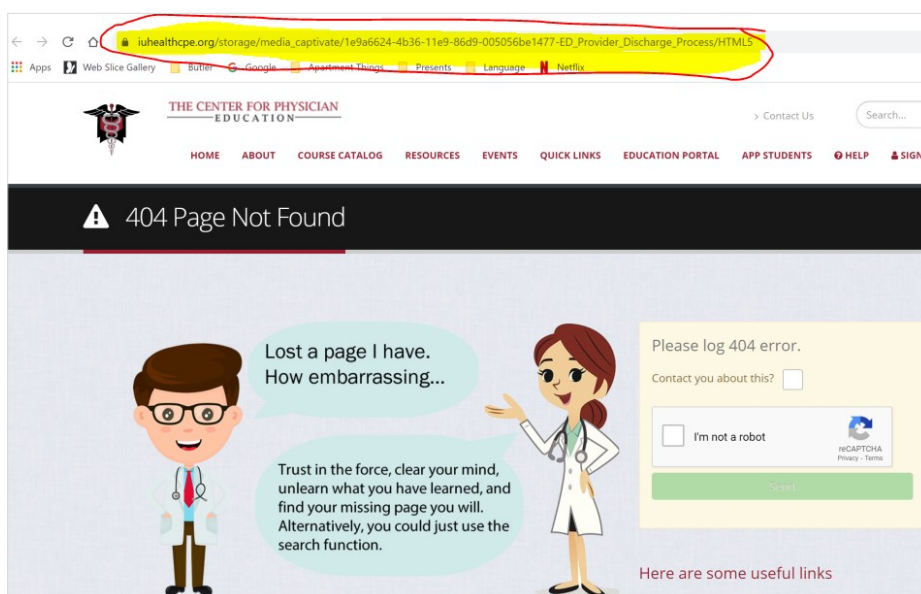
500 Error

This type of error can be multifactorial. Include a snapshot of the error, an explanation of what you were trying to do and when, along with the "**File**-line" number and "**Message**". Including the URL will also help the Development Team trouble-shoot the issue.
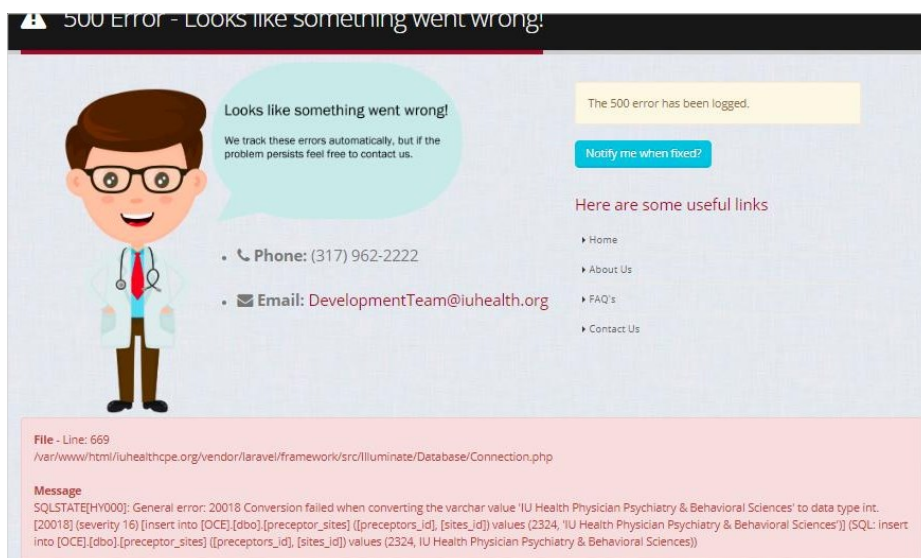
Troubleshooting Guide

"I cannot find/access LaunchPoint."

Note: Only students with an ED clinical should be using this view.

In Cerner, if you are unable to find ED LaunchPoint at the top left corner, you may look for it in the menu bar first or click on the 4 dots as shown here.