



LOMA LINDA  
UNIVERSITY  
MEDICAL CENTER

# LOMA LINDA UNIVERSITY MEDICAL CENTER

## OPERATING POLICY

<b>CATEGORY:</b>	HUMAN RESOURCE MANAGEMENT	<b>CODE:</b>	I-85
<b>SUBJECT:</b>	STUDENT LEARNING EXPERIENCE AND OBSERVATION REQUESTS	<b>EFFECTIVE:</b>	06/2017
		<b>REPLACES:</b>	03/2014
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### Definitions:

**Student /Learning Experience:** an educational opportunity that is requested for academic/school credit by a student, or desired by a licensed professional to update their professional skills. The learning experience may or may not involve direct patient care (clinical or non-clinical), however it will always involve hands-on or patient interaction learning of some type, including internships, externships, clinical rotations, research, or patient and family interviewing in a department or area within the organization. This opportunity may be requested by Loma Linda University (LLU) students, non-Loma Linda University (non-LLU) students, or any licensed/unlicensed professionals.

**Observation/Shadowing/Observational Mentorship:** a supervised experience during which no hands-on or verbal patient contact (e.g., interviewing of patients or families) of any kind by the observer or shadowing person is permitted. All observation / shadowing / observational mentorship experiences will be limited to a specific department or area, and observers / shadows / mentored observers must be assigned to and supervised by designated personnel. Observation/shadowing/observational mentorship experiences shall not include employees who are being trained or cross-trained as an experiential portion of their employment.

### Related Policies/Operational Guidelines:

[Tours - LLUMC \(OG A-4\)](#) (Operational Guidelines)

[Photography, Videography and Audio Recording \(A-22\)](#)

[International Benefit \(C-51\)](#)

[Special Spiritual Services by Visiting Persons or Groups \(V-34\)](#)

[\(388\) T-18 Visitors, Traffic Flow, Dress Code](#)

### A. STUDENTS

1. All students from approved and/or affiliated schools/programs shall be:
  - 1.1 Accountable to specifically appointed instructors, preceptors, or supervisors in their assigned training/educational area(s).

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- 1.2 Subject to all rules and regulations of the related facilities and/or training sites of Loma Linda University Medical Center (LLUMC) as defined in the signed Affiliation and/or other Agreement between the facilities and the school/programs.
2. All students requesting a learning experience shall, prior to the start of their experience:
  - 2.1 Meet applicable requirements and expectations to include:
    - a. A valid Affiliation Agreement between LLUMC and the participating school, applicable to predetermined academic course(s) or program(s), and a valid school professional liability insurance certificate must be on file in Staff Development.
    - b. Written, behaviorally-stated learning objectives and total hours requested
    - c. Designated LLUMC preceptor or supervisor
    - d. Submission of student paperwork to Staff Development as determined by Manager of Academic Relations, and to include applicable health screening requirements, background check clearance, proof of health insurance coverage, and proof of current professional license/certification if applicable.
  - 2.2 Meet designated orientation requirements
  - 2.3 Accept assigned training experience, location, days, and times
  - 2.4 Agree to comply with all applicable policies and regulations of LLUMC
  - 2.5 Receive no monetary compensation, or benefits, for time spent in assigned learning experience site location.
  - 2.6 Agree that assigned learning experience site location shall not offer to, or receive from, a school any monetary compensation for student's time spent in the training site location.
3. All licensed/unlicensed professionals requesting specific training, mentoring, or skill update, shall be considered by Staff Development Manager of Academic Relations, on a case-by-case basis, along with General Counsel and Risk Management consultation. Paperwork clearance shall be managed by Manager of Academic Relations, Staff Development.
  - 3.1 Clinical Edge Specialty (CES) Programs, coordinated through Staff Development, shall provide student placement and clearance management for the following professional programs:
    - a. Clinical Pastoral Education
    - b. RN Re-Entry

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- 3.2 Learning experiences for professional individuals or groups shall be requested in writing, along with written behaviorally-stated learning objectives, by their employment institutions or agencies, and a valid Memorandum of Agreement between the requesting institution and LLUMC must be on file with Staff Development.

## B. OBSERVERS

1. All observers shall comply with all applicable policies and regulations of the hosting facilities of LLUMC. Observation requests shall be considered in advance, and the specific required paperwork, including Risk and HIPAA documentation and applicable health screening requirements must be submitted to and processed through the appropriate accountable department or as follows:

NOTE: Observation experiences may be terminated at any time for any reason, including inappropriate behavior by the observer.

2. International Observers - All International licensed professional observers and mentorship requests are processed and reviewed through the Office of International Affairs/Global Health Institute, and reviewed for approval by the LLUMC Global Outreach Administrative Committee (GOAC). The list of requirements shall include, but not be limited to:
- 2.1 Name and position of requesting individual or group
  - 2.2 Appropriate U.S. entry visa
  - 2.3 Institutional sponsorship
  - 2.4 Applicable Processing and Hospital set-up fees
  - 2.5 Written learning objectives
  - 2.6 Health Clearance per Policy Guidelines
  - 2.7 Current CV or resume
  - 2.8 Valid professional licensure from home country, if applicable
  - 2.9 Ability to read, write, and converse in the English language (a test/interview may be required)
  - 2.10 Observers should not have serious health problems and conditions, and female participants should not be pregnant before or during participation in the program
  - 2.11 Health insurance coverage is required
  - 2.12 Observers should be limited to a predetermined timeframe
  - 2.13 Visa validation required upon arrival at LLU International Student and Scholar Services, Dean of Students Office, LLU
  - 2.14 Risk Management and HIPAA documentation must be completed for final processing through the appropriate accountable department
  - 2.15 Office of International Affairs/Global Health Institute will notify the hosting department when participant is clear to start
  - 2.16 Other requirements may apply

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3. Domestic Observers

- 3.1 Domestic physician observership requests shall be considered by, and if approved, processed through the Office of Graduate Medical Education on a case by case basis.
- a. Physicians possessing a valid California medical license may be eligible for observation or training as special fellows.
  - b. Individuals not possessing a valid California medical license may be eligible for observation only
  - c. Medical School graduates may be eligible as observers.
  - d. Physician observers shall be responsible for finding their own observership physician supervisors, with prior approval from Program Director or the equivalent, for the entire period of time they will be observing. The physician supervisors must meet the requirements of any licensed physician privileged to practice within LLUMC facilities.
  - e. Appropriate and continuous supervision shall be maintained at all times.
  - f. The maximum time for observation shall be up to 30 days within a 6 month period (two observerships maximum)
  - g. Applicants for medical school, graduate medical education or a faculty position may be escorted on tours of LLUMC by appropriate individuals.
- 3.2 Philanthropic requests shall be processed through the Children's Hospital Child Life Department:
- a. Objectives for visit stated in behavioral terms
  - b. Pre-determined location of visit
  - c. Supervision of activities of the visit
  - d. Limited timeframe based on nature of visit, and per Child Life protocol
- 3.3 LLU School Program requests for prerequisite hours shall be processed through Staff Development Department:
- a. Minimum age shall be 18 years old
  - b. Only requests received from a prospective LLU student shall be considered
  - c. Supervision shall be provided by an assigned preceptor in the department visited
  - d. Limited to a one-time opportunity with one professional, for a one department visit per person
  - e. Limited to designated program prerequisite hours
- 3.4 All General/Career, Pre-Medicine requests for observation shall be considered on a case by case basis by and, if accommodated, shall be processed through the Staff Development Department. This will include requests from individuals and/or groups of any type:
- a. Minimum age of observer shall be 18 years old at the time of request to observe.

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- b. Each request shall be considered on a case-by-case basis, based on a legitimate written purpose and goals for the observation experience.
- c. Observation experiences shall be limited to individuals not currently enrolled in a healthcare school program.
- d. Observation experience shall be limited to a one-time opportunity, with one professional, in one department or area of specialty per observer.
- e. Observation shall be limited to a maximum of up to 8 hours, or no more than one day, for observation /shadowing opportunity.
- f. High school or other group visit requests that are approved by Staff Development shall be limited to a maximum number of 15, including adult chaperones. Requests for observation and/or tours will be considered on a case by case basis based on a legitimate purpose and goals for the visit.
- g. Supervision shall be provided at all times by an assigned/designated preceptor in the area visited.
- h. Same-day or next-day observation requests shall not be considered
- i. Paperwork shall be submitted to Staff Development and include health clearance criteria outlined in Policy Guidelines.
- j. NO electronic devices of any type, and NO video/photo-taking will be permitted at any time during the observation / shadowing experience.
- k. Requests to observe in the Operating Room or patient procedure rooms shall not be accommodated.
- l. Friends or relatives of patients on whom surgery or a procedure is being performed shall not be permitted to observe.

3.5 Extended Observation Program requests for academic/school credit shall be considered, and if accommodated shall be processed through the Staff Development Department:

- a. Minimum age of observer(s) shall be 18 years old
- b. Requests must be received from the sponsoring school or institution, and include the observation purpose, objectives, and total hours.
- c. Each request will be considered on a case-by-case basis by Staff Development and the requested department or area, based on a legitimate written purpose and goals for the observation.
- d. A valid Memorandum of Agreement (MOA) and professional liability insurance certificate must be on file in Staff Development.
- e. Requests shall be limited to domestically trained professionals or students from domestic schools/programs.
- f. Requests will be limited to a one-time opportunity in one department/area, for up to 40 hours of observation.
- g. Submission of participant paperwork to Staff Development shall include health clearance criteria outlined in Policy Guidelines, proof of health insurance coverage, and proof of background check clearance.

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APPROVED: Hospital Executive Leadership, LLUMC Chief Executive Officer, LLUMC Infection Control Committee



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## ADMINISTRATIVE PROCEDURE

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**REPLACES:** 11/2013

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INITIATOR OF ACTION	ACTION
<b>I. EDUCATIONAL/TRAINING EXPERIENCE FOR ACADEMIC OR PROFESSIONAL CREDIT</b>	
<b>A. STUDENT REQUESTS FOR EDUCATIONAL/TRAINING EXPERIENCE</b>	
School or Program Student Sponsor(s)	1. Contacts Manager of Academic Relations, Staff Development, regarding desired experience; provides details of desired experience including official name of school program, written behaviorally-stated learning objectives, student name(s), total number of hours needed, desired start date, and student flexibility for scheduling.
Manager of Academic Relations	2. Consults with requested department regarding details of the request.  3. If student is accepted for training, sends Affiliation Agreement to School or Program Sponsor for review, if no valid Affiliation Agreement on file.
School/Program Sponsor	4. Reviews Affiliation Agreement, and returns signed Affiliation Agreement along with a copy of liability/malpractice insurance certificate to Manager of Academic Relations.
Manager of Academic Relations	5. Forwards signed Affiliation Agreement to Vice President for approval; files copy of document electronically upon return of approved Affiliation Agreement; returns executed original by mail or electronically to sponsoring School or Program per their preference.  6. Sends form and orientation guide to student(s) accepted for training.

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<b>INITIATOR OF ACTION</b>	<b>ACTION</b>
Student	7. Completes form, attaches required documentation, and submits to Staff Development within deadline prior to start of experience.
	8. Accepts responsibility for information presented and contained within the Orientation Guide.
Manager of Academic Relations	9. Reviews completed paperwork; notifies department manager or supervisor if and when paperwork has cleared. Notifies requesting student and school if paperwork is incomplete, and follows up with student for completion.
	10. Assigns supervisory preceptor, if applicable.
Student	11. Contacts department manager, supervisor or preceptor to discuss objectives, receive guidance to meet objectives and prevent conflict with other student assignments (follows same procedure for all subsequent educational training periods).
Preceptor and Student	12. Confirms scheduled days and anticipated timeframe for each educational training period.
Student	13. Notifies person in charge of department/preceptor upon arrival in area for each educational training period.
Preceptor	14. Provides supervision based on student's level of skill/knowledge proficiency, and evaluates student performance.
	15. Reports immediately to department head and to the Manager of Academic Relations if a problem or concern arises with a student. Asks student to leave the site if performance is unsafe, unethical, or negligent.

**B. PROFESSIONAL REQUESTS FOR TRAINING OR SKILL UPDATE**

Professional	16. Contacts Manager of Academic Relations regarding request for experience, and provides details of the request as needed.
Manager of Academic Relations	17. Evaluates if professional is part of the Clinical Edge Specialty (CES) Programs: a. Clinical Pastoral Education



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<b>INITIATOR OF ACTION</b>	<b>ACTION</b>
	<p>b. RN Re-Entry</p> <p>18. If the professional is part of a CES program, consults with appropriate Program coordinator(s); manage(s) the participant paperwork and notifies Program coordinator(s) when complete or if incomplete.</p> <p>19. Consults with requested department or unit for non-CES program request.</p> <p>20. Consults with General Counsel and Risk Management as applicable.</p> <p>21. Approves or denies request based on consultation.</p>
<b>II. INDIVIDUALS &amp; INSTITUTIONS REQUESTING OBSERVATION</b>	
<b>A. INDIVIDUAL REQUESTS PER POLICY I-85, Sections 4.1 to 4.5</b>	
Individual or Institutional Requests	<p><u>International Requests</u></p> <p>22. Contacts the Office of International Affairs noted in Policy I-85.</p> <p>23. All requests shall be considered 3-6 months in advance for paperwork processing.</p> <p><u>Domestic Requests</u></p> <p>24. Contacts the specific processing department noted in Policy I-85.</p> <p>25. Completes the appropriate paperwork and returns it to the specific processing department.</p>
Specific Processing Department	26. Reviews paperwork for completeness; notifies hosting department that observer is clear; arranges for supervisor as applicable.
<b>B. FOR SAHP AND GENERAL REQUESTS PER POLICY I-85</b>	
SAHP, General Pre-Medicine Observation	27. Contacts Staff Development with request.

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INITIATOR OF ACTION	ACTION
Requests	28. Completes the appropriate paperwork and returns it to Staff Development.
Staff Development	29. Complies with applicable LLUMC policies, including those for personal and environmental safety and confidentiality. 30. Reviews paperwork; sends confirmation letter to requesting observer; notifies host department that observer is clear to observe.
Hosting Department	31. Provides continuous and appropriate supervision to observer while in their department. 32. Terminates the observation experience at any time for any reason if observer's behavior and/or actions are non-compliant or unprofessional. 33. Notifies Staff Development if observation experience has been terminated.

### Health Clearance Criteria for Students and Observers

Health Clearance Group	Nature of Contact with Patient or Health Care Worker (HCW)	Seasonal Influenza (Oct 1 to March 31)	Neg PPD TB screening if > 8 hours (Pos PPD w/ MD clearance)	Tdap	MMR	Varicella	Hep B	Health Screening Self-Evaluation upon arrival
A	No direct contact with patients or entry into isolation rooms. ≤ 8 hours indirect contact with patients or HCW. <b>No occupational risk for airborne / body fluid exposure</b>	X						X
B	Contact with patients and/or HCW providing direct patient care in a manner that patient, HCW or student/observer may be at <b>risk</b> for <b>both airborne illness</b> transmission and <b>body fluid</b> exposure	X	X	X	X	X	X	X
C	All others	X	X	X	X	X		X