

Origination 8/28/2023

Last Approved 8/28/2023

Effective 12/15/2023

Next Review 8/27/2026

Owner Samantha Greed: Sys VP Ambulatory Nursing

Area Clinical Education

Applicability PeaceHealth System - All Hospitals + PHMG

Tags Policy



Clinical Observers Policy

SCOPE

This policy applies to all PeaceHealth settings and services in the location(s) checked below:

	Ambulatory Surgery Center	✓	PeaceHealth Medical Group
✓	Cottage Grove Medical Center	✓	Sacred Heart RiverBend
✓	Ketchikan Medical Center	✓	Southwest Medical Center
✓	Ketchikan Long Term Care	✓	St. John Medical Center
✓	Peace Harbor Medical Center	✓	St. Joseph Medical Center
✓	Peace Island Medical Center		System Services Center
✓	PeaceHealth Home & Community	✓	United General Medical Center
	PeaceHealth Laboratories		

PURPOSE

The purpose of this policy is to (1) define the circumstances in which observations or shadowing are appropriate, (2) ensure these experiences are conducted with the rights, dignity and interest of our patients in mind that adhere to PeaceHealth values, (3) ensure compliance with the Health Insurance Portability and Accountability Act (HIPAA) and standards for privacy of protected health information

(PHI), and (4) establish standard requirements for those who wish to observe hospital caregivers or physicians, or observe patient care activities or procedures.

DEFINITIONS

- **Allied Health Professional:** Healthcare workers who are registered, certified, licensed, or work under the supervision of a provider.
- **Caregiver:** Every PeaceHealth employee is a valued member of this team and so we refer to all employees as “caregivers” in order to recognize the important care giving role of everyone in the organization.
- **Clinician:** MD, NP, CRNA, ARNP, PA, CNM or any other Licensed Independent Provider.
- **Contracted Vendor:** Any person or organization with a written agreement with PeaceHealth, that provides products or services, including sales representatives, maintenance caregivers, orthotic/prosthetic caregivers, drug manufacturer representatives, dietary services representatives, etc.
- **Licensed Independent Provider:** Any provider permitted by law and by PeaceHealth to provide care and services, without direction or supervision, within the scope of the provider license and consistent with individually assigned clinical responsibilities.
- **Observer:** Is an individual who desires enhanced understanding of hospital operation that could best be acquired by closely observing or “shadowing” Medical Staff, Allied Health Professionals, and other caregivers in their patient care activities. These individuals are not fulfilling clinical rotation requirements. The experience for observers will be experiential only. The individual observing will not be involved with, assist with, or participate in any patient care.
 - An observer is not a caregiver assigned to the area or location, a contracted vendor, non-active medical staff provider, a student enrolled in an academic/clinical program affiliated with PeaceHealth, or a healthcare professional employed at another healthcare facility who will be coming to PeaceHealth to receive clinical training from PeaceHealth caregivers in specific skills or specialties.

POLICY

It is the policy of PeaceHealth to require written approval to host an observer in a patient care setting.

- It is typically PeaceHealth practice to exclude observers and job shadows from direct patient care settings. Only through written approval from the hosting department or during PeaceHealth sponsored events will these observation experiences be allowed.
 - NOTE: PeaceHealth facilities in each network will periodically sponsor job shadowing/observation events. Participants in these events will be required to follow the same requirements but coordinated through education and recruiting teams.
- An observer is an individual who desires enhanced understanding of hospital operations that could best be acquired by closely observing a Medical Staff clinician, Allied Health Professional, or other caregivers in their daily work.
- Individuals who wish to observe must attest to being at least 16 years on application.
 - If under the age of 18, parental consent to observe must be obtained via co-

signature on application and confidentiality agreement.

- Observers will only be accommodated during normal business hours of the department where the observation will occur. These hours may vary by department. Observation experiences should be coordinated and approved by department leadership.
 - Observations may not exceed 12 hours in a single encounter. At the discretion of network, facility, or CMO/COO/CAO/CNO, the time limitation can be adjusted to accommodate the needs of the observation.
- Request for observation must come from an active PeaceHealth Caregiver or active Medical Staff Member who will act as Sponsor for the observation experience:
 - PeaceHealth Sponsor is responsible for:
 - Providing and instructing the observer to complete and submit the following required forms:
 - Application to Observe at PeaceHealth
 - Confidentiality Agreement
 - Orientation Workbook for Observation Experiences
 - Obtaining approval from department/unit manager and/or patient clinician
 - Co-signing the observers "Application for Observation Experience at PeaceHealth" form, indicating complete responsibility for the observer as approved by the department/unit manager and/or patient clinician.
 - PeaceHealth manager/patient clinician responsibilities are listed below.
 - PeaceHealth Student Placement Coordinators will not match requesting individuals with a sponsor.
- Approved observers are required to:
 - Be always under the direct observation/supervision of their PeaceHealth sponsor.
 - Appropriate Attire. Refer to Dress and Appearance Policy
 - Immunization and Vaccinations, on application provide verification of:
 - Screening for Tuberculosis:
 - Two-step Tuberculin Skin Test (TST) (if positive, appropriate follow-up documentation)
 - OR
 - IGRA Blood Test (QuantiFERON®–TB Gold In-Tube test (QFT-GIT) or T-Spot).
 - Immunizations for:
 - Measles, Mumps, Rubella (MMR)
 - Hepatitis B (observations may be allowed if the observer is in the process of completing either the standard 3-dose, or Heplisav-B 2 dose series)
 - Tetanus, Diphtheria, Pertussis

- Varicella (Chicken Pox)
- Vaccinations for:
 - Annual Flu (if observation is scheduled during flu season, typically Oct-Mar) and must include where vaccination was received
 - COVID-19 documentation indicating Primary Vaccination Series or be up to date against COVID-19 based on guidance provided by the Center for Disease Control (CDC)
 - Must provide a copy of COVID-19 vaccination card with application.
 - Any student unable to verify COVID-19 vaccination status may be denied participation or MUST wear a KN95 face mask while in PeaceHealth facilities.
 - During elevated (high risk) COVID-19 outbreaks within a community, all observation experiences may be rescheduled at a safer time for protecting of patients, caregivers and observers.
 - Refer to the PeaceHealth COVID-19 Pandemic Control Policy, COVID Interventions Grid for additional information and restrictions. Observers will follow the same restrictions as Volunteers.
- Complete and sign the “Application for Observation Experience at PeaceHealth” form;
- Review and sign the Confidentiality Agreement.
- Obtain parent/guardian co-signature on the Application and Confidentiality Agreement if under age 18.
- Review orientation manual.
- The patient’s clinician and/or manager of the area where the patient is located, or Sponsor must ensure that:
 - Verbal consent has been obtained from the patient before the observer enters the patient's room.
 - The patient is allowed an opportunity to decline to have the observer present during care. If the patient declines, the sponsor will:
 - Request the observer to pause the experience and wait further directions.
 - Reassign the observer to another caregiver; or.
 - Reschedule observation experience
 - The purpose of the observer’s presence has been thoroughly explained and all questions the patient may have, have been answered to the patient’s satisfaction.
 - If the patient consents to the observation, then the Sponsor will:
 - Introduce the observer to the patient and other caregivers;

- Indicate clearly this individual's reason for observation;
 - Ensure the observer will not participate in hands on patient care in any way; and
 - Document patient verbal consent in the patient's medical record when applicable.
- Observers in areas where patient procedures are performed including but not limited to Operating Room, Interventional Radiology, Endoscopy, and Childbirth Centers are subject to the following additional requirements:
 - Managers of the area where the procedure/care will take place will approve the request;
 - Requests from Clinicians will have the name of the observer and the reason for the observation submitted to the procedural area leadership when the case is scheduled;
 - The observer's presence and purpose is pre-scheduled;
 - Review of Surgical and Procedural Consent section 7B to denote patient's decision regarding observers;
 - All observers to the surgical department will have appropriate surgical attire in restricted areas per Surgical Attire Policy; and
 - Documentation will be recorded in the patient's progress notes with date and time of consent given and the name of the observer.
- Observers signed paperwork is kept for a minimum of seven years per regulatory compliance requirements.
 - Clinical Education/PHMG Education maintains an electronic file for all completed forms.
 - All signed paperwork is to be scanned by the Sponsor and submitted to the local clinical education/PHMG Education student placement coordinator for electronic storage.
- This policy does not apply to the following:
 - Patient/family visitors.
 - Vendors or vendor representatives.
 - Students enrolled in a clinical program affiliated with PeaceHealth.

HELP

Further guidance may be obtained by contacting Clinical Education or PHMG Education.

RELATED MATERIAL

- Consent for Presence of Observer During Medical Procedure and Nursing Care - Note on "Surgical and Procedural Consent"

All Revision Dates

8/28/2023

Attachments

- [!\[\]\(756219e9389f679d57027482aa5cf5fc_img.jpg\) Application to Observe at PeaceHealth](#)
- [!\[\]\(fcb77b2d9531d23794a07d244b7a89bc_img.jpg\) Confidentiality Agreement](#)
- [!\[\]\(8175e06aff05874f50e11ffc448e6860_img.jpg\) Orientation Workbook for Observation Experiences](#)

Approval Signatures

Step Description	Approver	Date
	Shaina Hogan: Dir Policy Admin	12/11/2023

Applicability

PeaceHealth Cottage Grove Community Medical Center, PeaceHealth Ketchikan Medical Center, PeaceHealth Medical Group, PeaceHealth Peace Harbor Medical Center, PeaceHealth Peace Island Medical Center, PeaceHealth SHMC at RiverBend, PeaceHealth Southwest Medical Center, PeaceHealth St John Medical Center, PeaceHealth St Joseph Medical Center, PeaceHealth System Services, PeaceHealth United General Medical Center

Standards

No standards are associated with this document