

# Education and Training for the Next Generation

## Healthcare Students Playbook



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*Insert Organization's  
Logo Here*

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Insert Organization Name Here

# Education and Training for the Next Generation

## Healthcare Students Playbook

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

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

# *Health Professions Student Playbook*

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## Introduction and Background

### Overview:

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

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

## Play #1 –

### Partnership Approval and Communications with Schools

#### Overview:

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

The responsibilities are as follows:

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

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

The designated school contact personnel will communicate with Insert appropriate position(s) regarding all applications, questions and requests. Insert appropriate position(s) review school request details to determine whether the organization will accept additional academic affiliations at that time.

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

#### Key Steps for Choosing Academic Partners

- All school requests will be evaluated by Insert appropriate position(s)
- Determine if organization is interested
- Organization will review for appropriateness and provide feedback
- **Decision to affiliate with university can be based on some of the following:**
  - **Strategic Partnership**
  - **Capacity for requested discipline**
  - **Historic relationship**

- Available and sufficient preceptors
- Geography & programmatic consideration
- Insert appropriate position(s) reviews academic affiliation to assure all documentation is complete

### Key steps for initial communications with approved partners:

- School identifies the health professions track or program which they are seeking clinical rotations
- **The school acknowledges that the request for placement as an educational site will be made by the academic program, not the individual student**
- Insert appropriate position(s) provides the academic institution with the standard affiliation agreement for review and execution
- Upon receipt, Insert appropriate position(s) will review the contract to assure the following criteria are met:
  - Start/End Date or Evergreen
  - Institutional responsibility of infection control
  - Contact Information
  - Liability Information
  - Emergency Process
  - Student's Learning Objectives
  - Confidentiality/Privacy
  - Termination Procedure
- Organization will provide feedback; that the 1. Affiliation agreement is acceptable or 2. Requires revisions
- Once we have an acceptable affiliation agreement, both parties sign
- Insert appropriate position(s) ensures full execution of affiliation agreement and submits to Insert appropriate position(s)

**Important Note: If the academic institution contacts providers directly, the provider must refer the individual to the Insert appropriate position(s)**

## Play #2 –

# Affiliation Agreement Management

## Overview:

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

The responsibilities are as follows:

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

**Important Note:** An addendum can be used to outline the specifics of each placement

- Student information
- Identified preceptor
- Number of hours per week/days per week
- Duration of the rotation
- Type of rotation
- Responsible faculty at academic institution

## Play #3 –

### Student Capacity

#### Overview:

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

The responsibilities are as follows:

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

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

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

#### Key Steps:

- School provides student specific information on addendum form and submits to Insert appropriate position(s).
- **Student acceptance is based on:**
  - **Affiliated Institution**
  - **Preceptor Availability**
  - **Timing**
  - **Training Capacity**
  - **Primary Care Preparation**
  - **Student's Mission**

- Important to assess secondary review for:
  - Infrastructure space
  - Placement semester
  - Day of the week
  - Specific time for placement
- Acceptance decision is made by Insert appropriate position(s)
- Insert appropriate position(s) signs the addendum
- Insert appropriate position(s) emails the addendum to the key departments
  - Information Technology
  - Human Resources
  - Facilities
  - Operations
  - Training



## Play #4 –

# Initiating the Onboarding of a Student

### Overview:

Communicating with key departments is crucial to an efficient, streamlined process. This play exhibits when, how and who to communicate with regarding student placement details. **In this section, identify the position(s) that will take on the following responsibilities.**

The responsibilities are as follows:

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

## Play #5 –

# Communication with Student

### Overview:

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

The responsibilities are as follows:

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

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

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

### Key Steps:

- Insert appropriate position(s) emails student and school representative the following documents with cc: to assigned Preceptor
  - **Non-Employee Onboarding Packet**
  - **Non-Employee Manual**
  - **Dress code**
  - **Site Details (parking, pods, etc.)**
  - **Instructions on photo identification (badge)**
  - **Assigned date and location for technical training(s)**
- One week prior to start date, Insert appropriate position(s) follows up with the student to assure all paperwork has been completed and any outstanding questions are answered
- Insert appropriate position(s) adds student(s) email to internal distribution list and sends for addition to the external email distribution list

## Play #6 –

### Student is Trained

#### Overview:

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

The responsibilities are as follows:

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

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

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

#### Key Steps:

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

## Play #7 –

### Student Arrives

#### Overview:

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

The responsibilities are as follows:

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

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

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

#### Key Steps:

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

## Play #8 –

# Student Documentation & Reporting

## Overview:

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

The responsibilities are as follows:

- Compile student documentation to ensure vital information is collected for reporting and tracking of students
- Ensure that all student files are compliant
- Report to Leadership regularly on student data

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

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

## Key Steps:

- Insert appropriate position(s) organizes student information on:
  - **Start/End Date**
  - **Placement Location**
  - **Preceptor**
  - **Academic Institution**
  - **Academic Program**
- Insert appropriate position(s) will create a custom report to be distributed to Leadership on a quarterly basis
- **An ongoing health professions student training work group will meet no less than quarterly**
  - **Assess clinical staff as potential preceptors**
  - **Discuss new affiliations**
  - **Present data**
  - **Conduct process improvement projects**

## Play #9 –

### Off-boarding

#### Overview:

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

The responsibilities are as follows:

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

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

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

#### Key Steps:

- Two weeks prior to assignment completion, Insert appropriate position(s) will email student a final survey to gain insight on total student experience
- **Insert appropriate position(s) assures identification badge or any borrowed equipment have been collected from student before departure**
- Insert appropriate position(s) notifies appropriate department to turn off network access
- Insert appropriate position(s) notifies key staff and departments that student has ended their assignment

