Office of Clinical Education

Student Manual

Updated 2024, March

Phone: 317.962.5048
Email: *OCE@iuhealth.org*
Website: *https://iuhealthcpe.org/OCE*
Office Hours: M - F from 8a-4p
★ Federal Holidays are Observed ★

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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 (NP, PA, SRNA, AA, CNM, CNS and WOC) 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 formalized 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 must complete all their student profile so that their information transfers to OCE's database. There are multiple users to the registration portal. An incomplete profile leaves the student's account in a virtual void.

3. Students need to apply each and every semester 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 their school.

What is OCE's contact information?

Email your inquiries to *OCE@iuhealth.org* (preferred) or call our office at 317.962.5048 (M-F from 8a-4p). 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*.

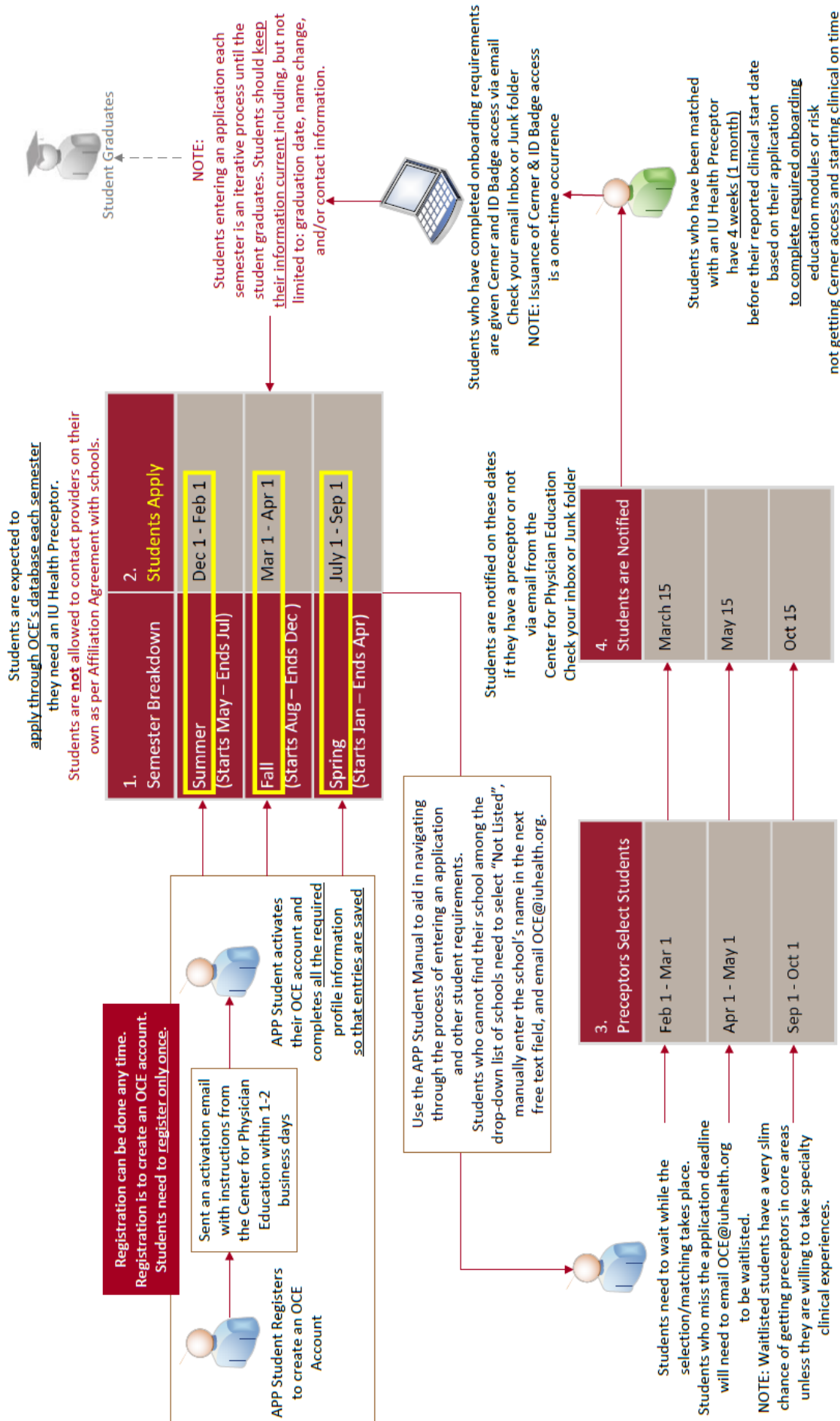## What kind of information should the APP student include in their email?

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)

OCE2022.02.09sg

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

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.

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

Student application portal closes at the end of OCE's business day on the last day that the portal is open. (Column 3 of OCE's calendar.)

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 for an account. Do not make multiple accounts.

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.

OCE's Website at a Glance

NEW APP STUDENT REGISTRANTS TO IU HEALTH'S OCE

Go to *https://iuhealthcpe.org/OCE* to sign-up for an account. Do not make multiple accounts.

1.

⇒ In creating your new account, click on the link "I do not have an account"

⇒ Note: only students with existing active accounts can sign in

⇒ Clicking the box, "Remember Me", eliminates the need to enter your username and password each time on the same device

⇒ Best practice: use your IU Health or school email

2.

⇒ You will be asked to complete the following required information

⇒ When you have entered the correct answer, click "Verify". You should see "Successful" if you entered the correct answer.

⇒ Click "Next" to move to the next stage of the verification process.

⇒ Note: If you already have an existing account, do not create a new one. Click "I already have an account". If the issue is that you forgot your password, select that option to reset password.

3.

⇒ The email you entered must be valid and spelled correctly.

⇒ Enter the verification code in the space provided

⇒ Use a password that meets the required criteria

⇒ Click "Next" to move to the next step of the registration

⇒ Note: you are not done with the registration process until all sections are complete

⇒ The multiple steps are required for data security

This button with this message means that the application portal is currently close. Do refer to OCE's calendar for application timelines.

03/2024

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). <u>The application portal closes at OCE's end-of-business day on the last day that the portal is open (2nd column)</u>. Once the application period closes, students will not be able to enter an application for the upcoming semester and must email OCE. *OCE can no longer waitlist students as there are usually no preceptors left once those who indicated as available to precept for the semester have been asked*.

♦ 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.*

♦ Applications are limited to 3 clinical experiences. Entering the same clinical experience twice or three times will not improve chances for placement.

  ◊ Prioritize your first application for the core clinical hours you need.

  ◊ Use your two other applications to select clinical experiences that could also be applied towards your core clinical hours. Explore clinical specialty areas that could meet core clinical experiences.

  ◊ Consult your clinical advisor if the clinical experience(s) you are intending to apply for is/are appropriate for your track, can go towards a core experience, or has the appropriate number of clinical hours.

  ◊ Depending on where the student is at in their program, there might be opportunity to explore other specialty experiences for a well-rounded training. Always consult your clinical advisor.

  ◊ The cumulative number of clinical hours per semester should be realistic to your workload.

  ◊ Each semester, students should enter an application if they are planning on being precepted by an IU Health provider. Use reminder apps.

♦ Notify *OCE@iuhealth.org* immediately to withdraw an application so that another student who needs the clinical experience may be substituted with enough notice.

03/2024

REGISTRATION DROP-DOWN OPTIONS GUIDE

Which drop-down options do I select from "Personal Information" when I register?

The registration database has many other users so there are many options to choose. Students <u>must select the correct options</u> so that all the correct information associated with them, including required onboarding education modules, can be seen in OCE's database by OCE, Coordinators and Preceptors.

	Student Type NP, PA, AA, SRNA	Student Type CNS	Student Type Midwifery	Student Type WOC
Role	Advanced Provider Student	Advanced Provider Student	Advanced Provider Student	Advanced Provider Student
Specialties	NP Student, PA Student, CAA Student, SRNA Student	CNS Student	CNM Student	WOC Nurse Student
Credentials	"Other" or "RN" as it *currently* applies	"Other" or "RN" as it *currently* applies	"Other" or "RN" as it *currently* applies	"Other" or "RN" as it *currently* applies
Location	The location option is fixed to 3 locations with the Advanced Provider Student Role. Do <u>not</u> change.			
Email	IU Health employees should use their work email as primary email - - - - <u>Non-employees should use their *school email* as primary email</u>			

Make sure your profile is complete as this is key to your account's accuracy that you <u>leave nothing blank</u>. Missed entries will lead to account issues.

School

Program

Student ID   Expected Graduation Date

Acceptable Preceptors (can select multiple)   Current Employment

Have you ever or do you currently have Cerner access?

Emergency Contact Name   Emergency Contact Number

Advisor Name   Advisor Email

Advisor Phone   Advisor Other

Regional Preference (Drag regions to order)
- Central(Metro)
- West-Central
- East-Central
- South

Leaving these information blank potentially creates issues with your account, access, and user views:	
Category	**Why this matters**
School	Sorting; authentication; views
Program	Sorting; authentication; views
Student ID	Data Security; identifier
Graduation Date	Cerner access timeline
Current Employment	Oracle nonworker account and Cerner access
Q: Previous or current Cerner access	Correct issuance of Cerner access type
Emergency contact	Required by IU Health
Permanent home address	Needed for Oracle assignment by HR
Advisor name	Data match
Advisor email	Data match (to advisor name)
Regional preference	Location/region assignment placement

SELECTING THE CORRECT REGIONAL LOCATION FOR CLINICAL

Which part of the state are you thinking of going for clinical?

Clinical site rotations are divided regionally. Students must select the correct clinical region to avoid long commute times. There is no default region which will leave that category blank. Preceptors and OCE will not know which region the student prefer to go to for clinical.

The location drag-drop location options

Select the region by order of location preference in the state of Indiana. Skipping this part leaves your location preference blank. Do not leave anything blank. Missed entries will lead to account or application issues.

Select the Correct Site Location When Entering a Clinical Application

Regional Preference (Drag regions to order) | View Region Map

- North-East Region
- Indy Metro & Suburban Region
- West Central Region
- East Central Region
- South Central Region

Be mindful when you drag and drop your regional preference that you select the correct site to avoid getting placed at a clinical location further away from your preferred driving distance.

West Central Region (Arnett Physicians)
- IU Health Arnett (Lafayette)
- IU Health Frankfort (Frankfort)
- IU Health White Memorial Hospital (Monticello)

Includes:
Medical Services in Otterbein, Monticello, West Lafayette, Lafayette, Delphi, Frankfort, Kokomo, Tipton

North-East Region (Fort Wayne Physicians)
- IU Health Fort Wayne (Fort Wayne)

East Central Region (Ball Memorial Physicians)
- IU Health Ball (Muncie)
- IU Health Blackford (Hartford City)
- IU Health Jay (Portland)

Includes:
Medical Services in Harford City, Portland, Muncie and Richmond

South Central Region (Southern Indiana Physicians)
- IU Health Bedford Hospital (Bedford)
- IU Health Bloomington Hospital (Bloomington)
- IU Health Paoli Hospital (Paoli)

Includes:
Medical Services in Gosport, Columbus, Nashville, Paoli, French Lick

Indy Metro Region & Suburban Region (IUHP Physicians)
- IU Health Methodist Hospital (Indianapolis)
- Riley Hospital for Children at IU Health (Indianapolis)
- IU Health University Hospital (Indianapolis)
- IU Health North Hospital (Carmel)
- IU Health Saxony Hospital (Fishers)
- IU Health Tipton (Tipton)
- IU Health West Hospital (Avon)

Includes:
Medical Services in Carmel, Fishers, Lawrence, Indianapolis, Mooresville, Martinsville, Brownsburg, Zionsville, Speedway, Greenfield, Greenwood, Noblesville

Note: Requests for specific clinical sites cannot be guaranteed as placement depends on provider availability each semester.

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CLINICAL APPLICATION OPTIONS

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.

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.

4. Then the "Apply for Clinical Placement" button will appear.

MY REQUEST & ASSIGNMENT LIST

1. Edit Student Information

2. Edit Personal Information

3. Please Provide Personal Information Before Applying

4. Apply for Clinical Placement

App

Has someone agreed to precept you?
Yes: ○ **Click only if you have one**
No: ● **This the default**

Will your coordinator match you?
Yes: ○ **Click only if this applies**
No: ● **This the default**

Start and end of clinical dates: (mm/dd/yyyy). For the Spring semester, the accepted dates are between 01/01/2024 - 05/01/2024

| 📅 **Must follow the required date format** | to | **Must follow the required date format** |

Total Clinical Hours Needed: (Estimate if unsure)
Must be a whole number

Setting:
Select the appropriate drop-down option ▾

Experience Type:
Select the appropriate drop-down option for your program requirement ▾

Learning Objectives:
Update your learning objectives each semester to reflect skills/knowledge/learning you are seeking as you progress in your program.

Submit Clinical Application

Don't forget to click "Submit Clinical Application" to save your application

Be advised that your application is not saved/completed unless the red line reaches the end-point as indicated by the arrow below. You will know you have successfully completed entering an application when you see your application listed under "Pending Requests."

App

REVIEW & UPDATE INFORMATION & CLINICAL APPLICATIONS

Keep your student information updated. Most common updates needed are name change or graduation date. Other updates should include clinical experience and learning goals as the student progresses each semester.

MY REQUEST & ASSIGNMENT LIST

1. Edit Student Information
2. Edit Personal Information
3. Apply for Clinical Placement

Edit Student Information Allows the student to update the following: school, program, graduation date, employment, emergency contact information, advisor name and contact information. This is also where the student would update their clinical regional preference. Don't forget to click **Save**

Edit Personal Information Allows the student to update the following: previous clinical experiences, work experience, personal and professional strengths, skills focus areas, days of the week the student is available for clinicals, advisor's information, and other information relevant to what you would like the potential preceptor to know. Leaving a section blank will keep you from saving your entries.

Apply for Clinical Placement This function was covered in a previous page.

Approved Assignments

Dates	Hours	Preceptor	Status

Pending Requests

Dates	Hours	Experience	Status	Edit
08/01/2023 - 09/01/2023	22	Cardiology	Coordinator	⚙️

Completed

Dates	Hours	Preceptor
08/01/2020 - 08/30/2020	80	Robin PreceptorTest

Withdrew, Declined, etc.

Dates	Hours	For/With	Status
01/01/2023 - 12/31/2023	1	Robin Trittipo-Tester	Withdrew
03/02/2023 - 03/03/2023	5	TEST-Cheryl TEST-Griffith	AA Declined

Approved Assignments are the clinical applications that have been matched with a preceptor for the upcoming or current semester.

Pending Requests are the clinical applications you have successfully entered. The status "Coordinator" indicates that you have either selected that your Coordinator will find a preceptor for you or your Coordinator has looked into your application.

Completed are the clinicals you have completed or have reached the end date of your application. The Preceptor column shows the preceptor's name.

Withdrew, Declined, etc. are the clinical applications that were withdrawn or declined (for lack of preceptors). Applications that were withdrawn before preceptor matching will generate an email to the student and to OCE.

Students who were declined will receive an email at the appointed date (please refer to OCE's semester calendar).

Important to note: Students who no longer need a clinical with an preceptor, please email OCE@iuhealth.org as soon as possible so that a declined student can benefit and have a preceptor.

1. Withdraw application
2. Update Clinical Application
3. Submit Withdraw application

‹ Previous   ✕ Cancel   Next ›

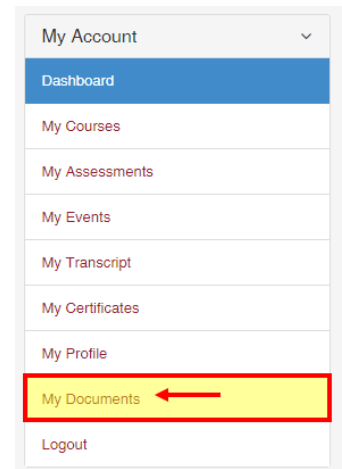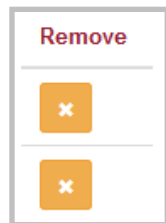# UPLOADING DOCUMENTS TO YOUR STUDENT ACCOUNT

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 | ❓ 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 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 for compliance audits. Submit the required documents to your school in a timely manner so that your school has these documents on file and ready to send to IU Health at a moment's notice in the event of an audit.

1. Immunization Records including:
   - 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)
6. COVD attestation requirement has been built into your required learning. Make sure to upload whatever file has been requested to the link embedded in the module.

REQUIRED ITEMS TO BE COMPLETED & OCE ANNOUNCEMENTS

Announcements will be posted on OCE's website at the top of the page. Make a habit of visiting OCE's website every now and then for any announcement updates.

ATTENTION STUDENT REGISTRANTS NEW TO OCE

Click here for the **APP Student Manual** which will guide you through the process of selecting the correct drop down options for registration & application.

Students employed by IU Health need to use their IU Health email. Students not employed by IU Health, please use your school email.
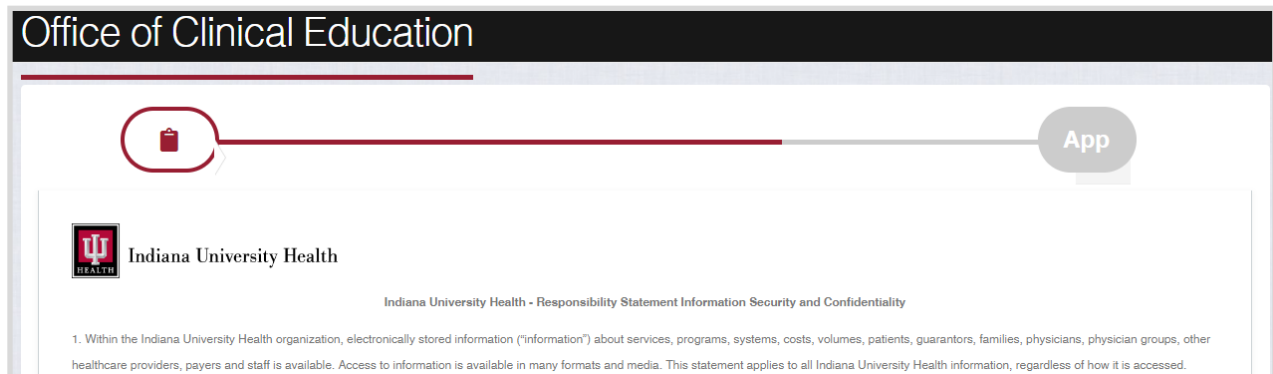
Students are required to submit a clinical application each semester during open application dates.

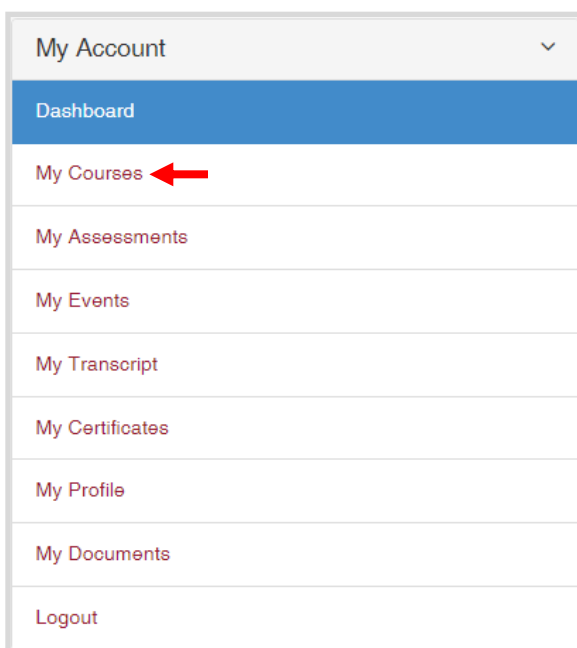To inquire if there is an affiliation agreement with your school, contact OCE@iuhealth.org.

Login and click here to access intial onboarding education after preceptor assignment.

ANNOUNCEMENTS:

Before students can enter an application, the Indiana University Health—***Responsibility Statement Information Security and Confidentiality*** form will need to be acknowledged. Be sure your read what IU Health's expectations are regarding patient information.

Office of Clinical Education

App

Indiana University Health

Indiana University Health - Responsibility Statement Information Security and Confidentiality

1. Within the Indiana University Health organization, electronically stored information ("information") about services, programs, systems, costs, volumes, patients, guarantors, families, physicians, physician groups, other healthcare providers, payers and staff is available. Access to information is available in many formats and media. This statement applies to all Indiana University Health information, regardless of how it is accessed.

The required onboarding modules can be found under the "Education Portal" tab. Regardless of the student's employment status with IU Health, all are required to complete the assigned modules at least one month (4 weeks) before the student's clinical start date. Students who delay completing these requirements could experience a delay in clinical start date and delay in student Cerner-role access activation.

THE CENTER FOR PHYSICIAN EDUCATION

> Contact Us   Search...

HOME   ABOUT   COURSE CATALOG   RESOURCES   FAVORITES   EVENTS   QUICK LINKS   EDUCATION PORTAL   APP STUDENTS   ❓HELP   👤

My Account ⌄

Dashboard

My Courses ←

My Assessments

My Events

My Transcript

My Certificates

My Profile

My Documents

Logout

Dashboard—is the student's default view. Here you can find multiple course offerings.

My Courses—lists all the required modules you need to complete. Completed modules will be marked with **Complete** at the top right of the module tile. Students need to do the modules marked **Incomplete**.

My Assessments—only applies if you have any on file

My Events—lists events you have signed up for

My Transcript—lists all the modules you have completed

My Certificate—allows you to download completion certificates

My Profile—allows you to update/add emails or change password

My Documents—lists the responsibility statements completed

IU HEALTH & OCE'S EXPECTATIONS OF APP STUDENTS

1. **Students must complete the *Data Stewardship Agreement* (or IU Health Responsibility Statement Form) 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 Cerner access 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 from OCE.

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!

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.

Trouble Shooting: Calculating Clinical Hours (continued pt. 3)

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.

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
Audience:	**Providers, Residents, and Clinicians with Provider View and My Experience**	helpdesk@iuhealth.org

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…
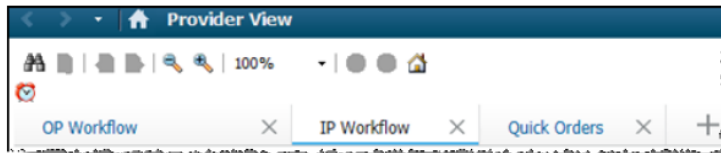
OR

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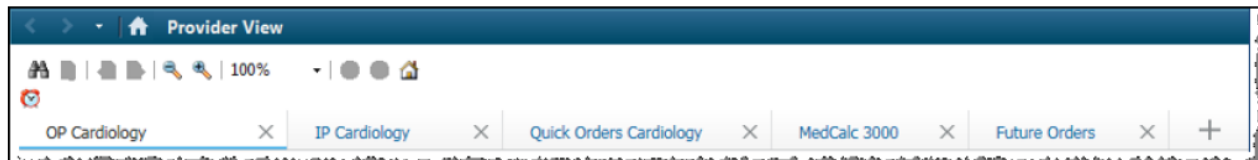
Note: The MPages are labeled as **Outpatient**, **Inpatient**, along with the **Specialty**. The MPage should default based on the **Encounter Type**.

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.
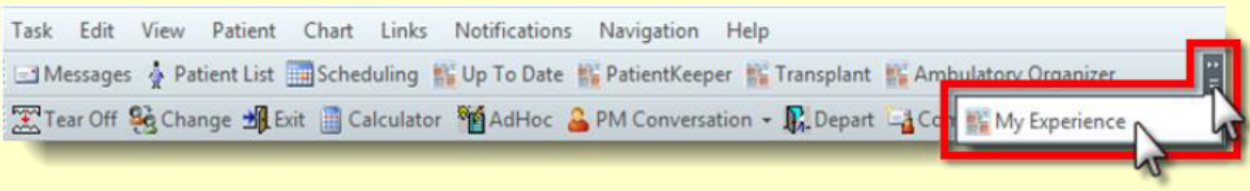
Continued on next page

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.
	The My Experience View Selection window displays.
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** helpdesk@iuhealth.org	**Effective Date** Current Functionality

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

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.*
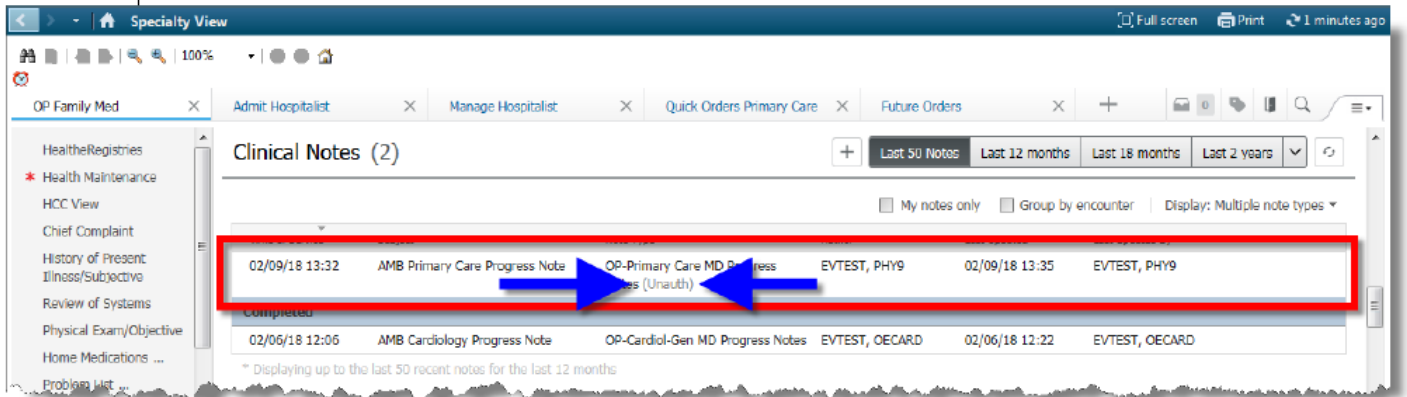
Note Statuses Meanings

- **"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)
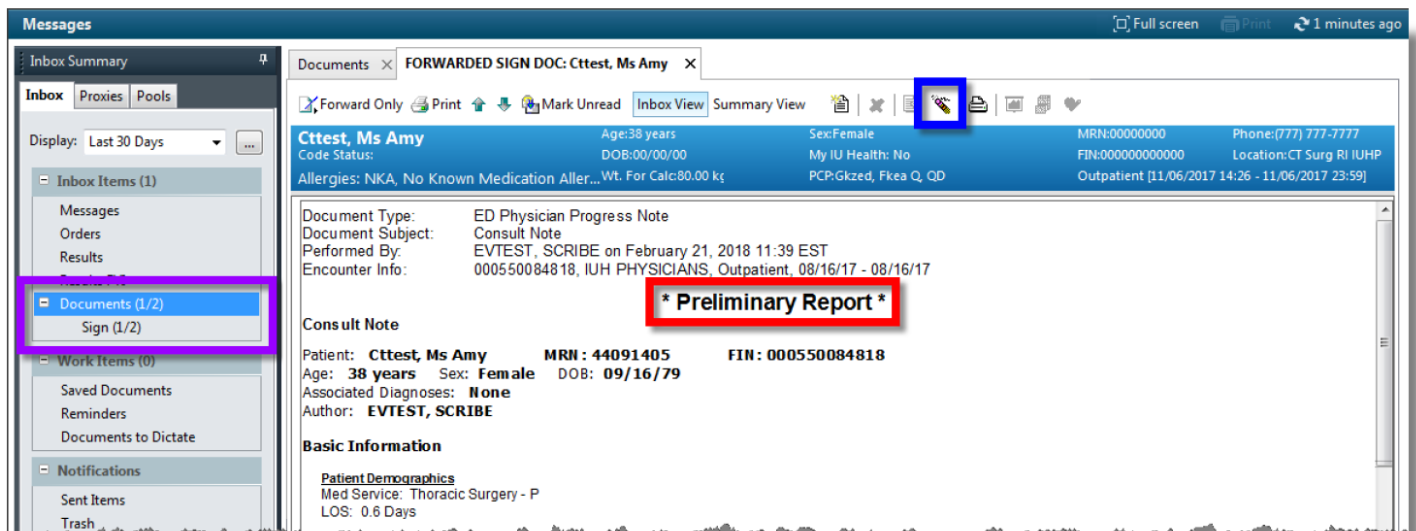
- When opened, the note header reads, "*** Preliminary Report ***."
- The preceptor receives the submitted note in Message Center, in the **Sign** folder (*as in the past*).
- The preceptor can now make direct **changes/corrections** to the note before signing.

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

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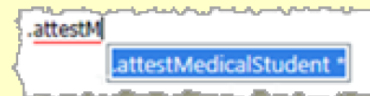
I personally evaluated the patient. I have reviewed, and, where needed, edited the note to assure that it is accurate, and agree with the content and plan as documented. |

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

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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
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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 |

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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 users to the registration portal. Double-check the drop-down options you selected by comparing it with what is listed on the APP Student Manual page titled " REGISTRATION DROP-DOWN OPTIONS GUIDE".

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

Students who missed the application deadline will have to apply for the next semester as OCE can no longer waitlist students who did not apply on time. There simply are not enough preceptors to go around in the first place that by the time notifications are sent out, there are no more available preceptors left.

"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. Double-check the drop-down options you selected to make sure you chose the correct ones by comparing it with the list in the APP Student Manual titled "REGISTRATION DROP-DOWN OPTIONS GUIDE"

"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 upcoming clinical semester on the dates specified on OCE's calendar (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, Women's Health and Behavioral Health are the most requested clinical experiences.

2. The student did not enter an application in a timely manner.

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 on time?

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 of your planned clinical start date. *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 or graduation date has changed will need to update their profile in a timely manner and email OCE@iuhealth.org 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.
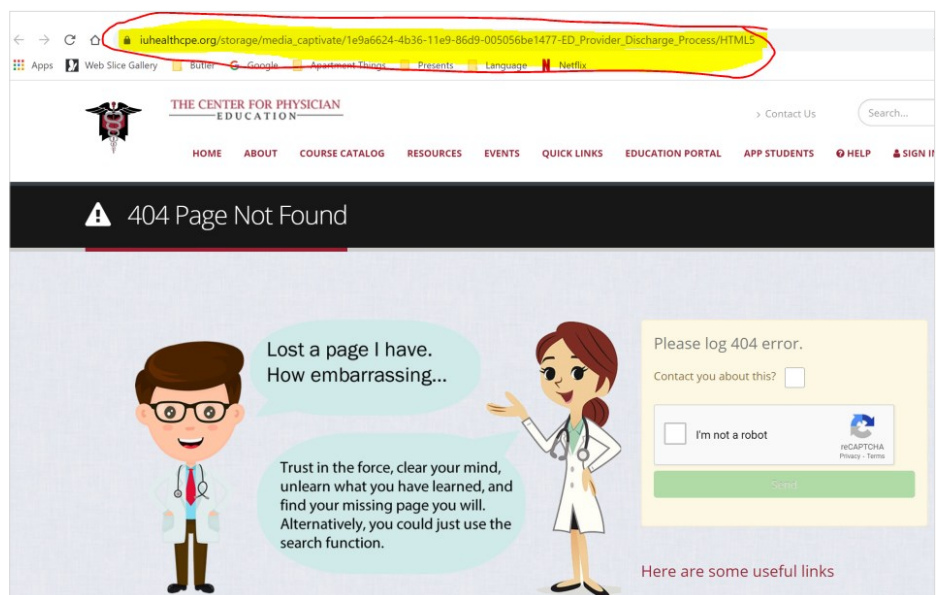
500 Error

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.
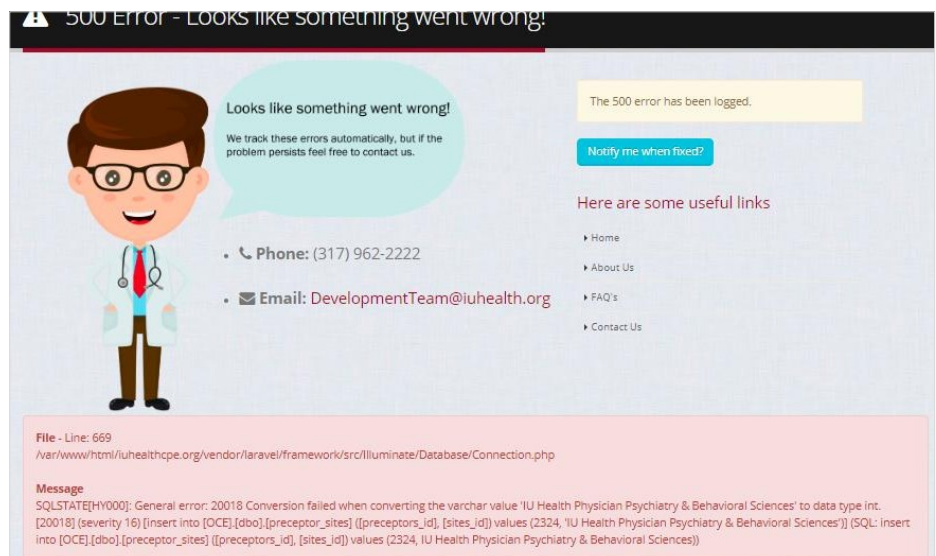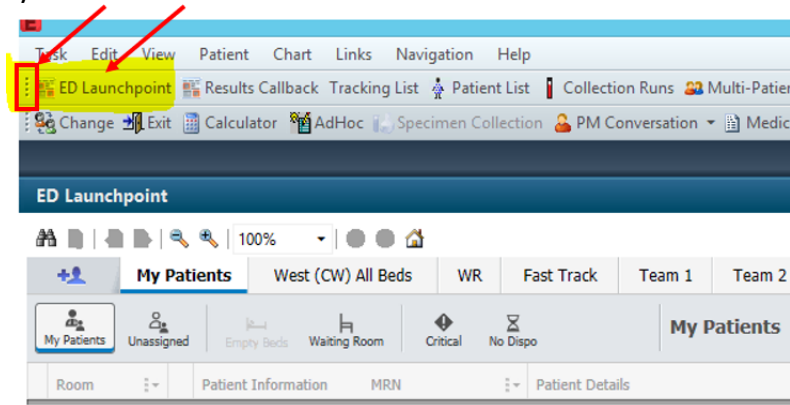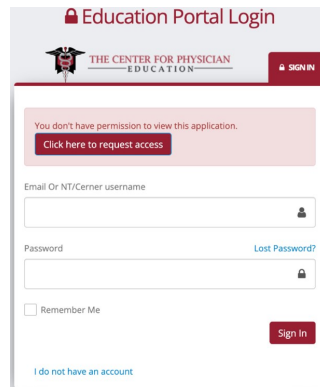
Troubleshooting Guide

"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.

I received a "You do not have permission to view this application" message.

If you receive this type of message, simply click on the red button.

—LAST PAGE—