Guidelines for Clinical Shadowing Experiences for Pre-medical Students

Purpose:

The following guidelines are intended to be used as a model and by no means are intended to supersede any agreements already established. Advisors, students and others are welcome to adopt all or portions of this document for the use of pre-medical students interested in pursuing a career in medicine. These guidelines also suggest a protocol for a physician – pre-medical student agreement as it relates to patient interaction. These guidelines are not a legal document. It is a framework established to help pre-medical students understand the difference between shadowing and volunteering, potential learning objectives of the experience, their expected responsibilities, as well as appropriate code of conduct. These guidelines are intended to be used by either the pre-medical student or the physician to initiate the conversation of expectations related to the shadowing experience.

Contributors:

These guidelines were established by the Association of American Medical College's (AAMC) Group on Student Affair's (GSA), Committee on Admissions (COA) in consultation with National Association of Advisors for the Health Professions (NAAHP) and the American Medical Association (AMA), and Dr. Elizabeth Kitsis, director of bioethics education, assistant professor, Epidemiology and Population Health and Medicine of Albert Einstein COM. Dr. Kitsis authored several commentaries in JAMA addressing Clinical Shadowing. These groups addressed a need to develop standard criteria for students to shadow physicians in medical facilities. The need for standard criteria arose from a concern that high school and pre-medical students are "strongly encouraged" by medical school admissions committees to have clinical shadowing experience. However, the Health Insurance Portability and Accountability Act (HIPAA) and other regulations often serve as impediments to many physicians who might otherwise provide student shadowing experiences. In addition, individual hospitals may have standards for shadowing of physicians by students, but these vary widely from one institution to the next, with no recognized national standard. These guidelines were also developed to emphasize the importance of patient rights, privacy, and confidentiality.

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Introduction: Guidelines for Clinical Shadowing Experiences for Pre-medical Students

Learning what it means to be a physician is essential for college students considering a career in medicine. Participation in a variety of activities that provide exposure to diverse health care settings can help achieve this goal. These activities allow students to gauge and affirm their interest in medicine as a career. Shadowing is different from volunteering; volunteering enables a pre-medical student the unpaid opportunity to help in a healthcare setting. Depending on the clinical environment, volunteering might include filing paperwork, answering phones, reading a book or playing a game with a child. Shadowing experiences, however, are observational in nature. The pre-medical student observes as the healthcare professional provides care to patients. This may occur in varied clinical settings including hospitals, outpatient clinics, long term care facilities and/or private practice. Observation always occurs under the appropriate supervision of a licensed physician or other licensed health care professional.

A shadowing experience not only provides an introduction to the profession of medicine and the day-to-day responsibilities of the health care provider, but it also offers the physician and/or other health care provider the opportunity to model professionalism as well as ethical and culturally sensitive treatment of patients. Critical to the experience is the awareness and education of both the pre-medical student and the patient regarding the importance of the patient's rights, privacy and confidentiality.
Since the primary purpose of shadowing is observation, the experience should focus on watching the physician as s/he performs his or her duties. The pre-medical student should never engage in any activity that is considered the practice of medicine. These activities include, but are not limited to: diagnosing diseases, administering medications, performing surgical procedures, suturing, providing medical advice or other tasks generally reserved for the trained health professional.

The following learning objectives serve as guidelines for the pre-medical shadowing experience:

Learning objectives for the pre-medical student:

- Determine the fit of the profession including aptitude, dedication, and attributes needed to pursue and practice medicine
- Enhance knowledge of how the patient perspective impacts quality care
- Better understand the roles of the health care team

Pre-medical student responsibilities:

- Provide proof of required immunizations or immunity (i.e., MMR, Varicella (or had chicken pox), Td, TB) prior to shadowing.
- Complete HIPAA compliance training or review the training provided by the healthcare provider prior to shadowing experience.
- Sign an agreement to adhere to a Code of Conduct (Appendix A).
- Pre-medical student should sign an agreement of confidentiality (Appendix B).

Physician – pre-medical student agreement:

- Establish how pre-medical student will be introduced to patients (e.g., "this student aspires to enter medical school).
- Establish a protocol as to how and when a patient is asked if the pre-medical student can observe the patient-physician interaction (e.g., informed verbal consent - patient is asked by medical staff during check in; patient's response noted in medical record)
- Establish boundaries and expectations as to when a pre-medical student's questions are to be asked and answered (e.g., between patients visits or at the end of a shadowing shift).

Resources:

http://www.hpplc.indiana.edu/ohp/clinicalobservation.shtml

https://www.aamc.org/download/181690/data/guidelinesforstudentsprovidingpatientcare.pdf

http://www.ama-assn.org/ama/pub/physician-resources/solutions-managing-your-practice/coding-billing-insurance/hipaahealth-insurance-portability-accountability-act.page?

http://www.ama-assn.org/ama/pub/physician-resources/legal-topics/patient-physician-relationship-topics/patient-confidentiality.page?

http://fmignet.aafp.org/online/fmig/index/resources/hipaaresources.html

Appendix A

Code of Conduct for Premedical Students Participating in Shadowing

When shadowing a physician, I will:

1. **Arrive promptly.**
2. **Accurately represent my position and role.**
3. **Appreciate the limits of my role as an observer by not engaging in activities like, but not limited to, diagnosing diseases, administering medications, performing surgical procedures, suturing, providing medical advice or other tasks generally reserved for the trained health professional.**
4. **Respects patients' rights to refuse to have students present.**
5. **Treat all patients and staff with respect and dignity, regardless of age, gender, race, ethnicity, national origin, religion, disability, or sexual orientation.**
6. **Maintain strict confidentiality and privacy about patient information. (described in detail in Appendix B)**
7. **Maintain honesty and integrity by being forthright in my interactions with patients, peers, physician supervisors and staff.**
8. **Ensure patient safety by remaining at home if I am ill; and will notify physician of my planned absence.**
9. **Report concerns about patient safety to the physician who is being shadowed.**
10. **Behave in an appropriate, professional, courteous manner at all times.**
11. **Not initiate or accept patients' invitations to engage in social or social media relationships.**
12. **Dress and act professionally.**
13. **Not abuse drugs or alcohol.**
14. **Be aware of and follow the guidelines of my sponsoring institution and of the setting in which I am an observer.**

I agree to follow the Code of Conduct described above:

Print name_____Signature_____Date_____

Appendix B

Confidentiality and Privacy of Patient Information

Dear Student,

As a student who is rotating in this health care setting and office practice, you have an ethical and legal duty to keep patient information confidential. Federal law known as the Health Insurance Portability and Accountability Act of 1996 (HIPAA) allows health care providers to use and disclose patient information for certain reasons, such as treatment, but at times it is necessary for the patient to agree to have his/her information used or disclosed. Health care providers also must consider who has access to the information and how much they need to see. Allowing a student to observe an encounter between a provider and a patient requires patient authorization. Failure to maintain the confidentiality of patient information as required by HIPAA is considered a violation of the law and may have serious consequences.

Some general guidelines:

- Access patient information only under the direction and supervision of the health care provider you are shadowing.
- Share or discuss patient information only when necessary and only in locations where the confidentiality of that information can be maintained.
- Patient information should never be disclosed in any form of social media.
- Be familiar with and follow the health care system and provider's policies on confidentiality and privacy.
- Should you have any questions or concerns, discuss them with the physician you are shadowing.