



Procedures Manual

DEPARTMENT OF CLINICAL AFFAIRS
CLINICAL EDUCATION

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ACADEMIC YEAR ONE

ANNUALLY

Communicate with each site and hospital coordinator to re-credential preceptors and assure/confirm upcoming availability. Enter availability into CORE-Elms.

Physician Role Experiences (PREs)

As part of the first-year student education, the Physician's Role in Health Sciences (PRHS)-II course provides students the opportunity to participate in various healthcare organizations' public health projects. Students will attend their assigned facility, one half-day a month, on Thursdays. Students are divided into rotating groups with some groups on campus and other groups at their designated sites.

PRE- Clinical Site Procedure

Procedure Overview:

1. Identify and obtain
 - a. Point(s) of Contact Information
 - b. Name, title, address, phone, email
2. Identify site interest in number of students accepted
3. Identify/verify site requirements
4. Obtain marketing materials
 - a. Videos
 - b. Brochures
5. Identify Public Health Project(s)
6. Arrange and schedule orientation and onboarding
 - a. Date(s) and time
 - i. Orientation
 - ii. Onboarding
 - b. Student requirements needed to bring for onboarding

Active Students

Procedure Overview:

1. Request from Student Affairs a student roster and immunization records
2. Create a Clinical Affairs immunization record utilizing the template
 - a. Upload immunization record to CORE

CORE Introduction

Procedure Overview:

1. Open Research Center for one week
2. Email students instructing them to make site selections
3. Close Research Center
4. Run SmartMatch report and verify all selections
5. Handslot students as needed
6. Email students instructing them their PRE-site is available for viewing and site requirements for completion
7. Follow up with students regarding completion of site requirements

PRE-Orientations

Procedure Overview:

1. Add students to Outlook calendar invite for site orientations
2. Send follow up reminders
3. Participate in site orientations

ACADEMIC YEAR-TWO

Mid-Session Second Year

PROGRESSION FROM OMS-II to OMS-III: Definition of an OMS-II

1. Satisfactory completion (passing grades) of All OMS-I and OMS-II courses.
2. Completion of all service-learning experience activities required for OMS-I and OMS-II.
3. Successful compliance with all clinical training requirements such as: immunizations, orientations, proof of insurance, etc.
4. Recommendation for promotion by the COM-SPC to the Faculty Senate. All records are reviewed by SPC to determine whether the student has fulfilled all academic requirements; has maintained the standards of ethical, moral, personal and professional conduct required for the continued study of osteopathic medicine; and is mentally and emotionally fit to become a physician.

Procedure Overview:

1. Request notification from Student Affairs the OMS-III eligible student roster
2. In CORE, create clerkship groups
3. SmartMatch clerkships
4. Notify students of SmartMatch
5. Send email reminders and follow up with students regarding:
 - a. Start dates
 - b. Site requirements

PRE-SITE Requirement Updates

Procedure Overview:

1. Verify all site requirements
 - a. Adventist
 - b. Golden Valley
2. Point(s) of Contact
 - a. Name, title, address, phone, email

New Preceptors

Procedure Overview:

1. Identify point(s) of contact and information
2. Email preceptor credentialling documents
 - a. Affiliation agreement
 - b. Personal Information Form
 - c. Supporting Letter of Recommendation
 - d. W-9
 - e. Request a current CV
3. Follow up with preceptors
4. Verify all documents have been completed and signed
5. Enter and verify Board Certification using primary source verification
6. Enter and verify State License (See License Verification SOP)
 - a. Credentials: must be board certified D.O., M.D.
7. Create CORE accounts
8. Upload documents under "Requirements"

ACADEMIC YEAR THREE

Annually:

Clerkship Site Evaluation

Procedure Overview:

1. At least 30 days before planned site evaluation visit, email staff contact at site regarding site visit
2. Request meetings with available preceptors, staff contact (if available) and students who will be rotating at that site that month
3. Schedule meetings for total of 2 hours, with a tour of facility
 - a. Separate meeting with preceptors
 - b. Separate meeting with students
4. Associate Dean for Clinical Affairs or designee arrives at site for meeting, participates in requested meetings and takes tour of facility; makes note of items on form
 - a. GME at site
 - b. IPE at site
 - c. Any didactics available
 - d. Student onboarding/credentialing process
 - e. Discusses aggregate student performance for the site (COMATs, preceptor evaluation of students, student evaluations of preceptor)
 - f. OMM opportunities at the site
 - g. Library or other learning resources available
 - h. Discuss adequacy of facility: student lounge, study space, safe storage space, call rooms, availability of food
 - i. Discuss with students their experience, the adequacy of the facility, opinion of learning environment
5. After the visit, Associate Dean or designee fills out site evaluation form
6. Form given to lead clinical education coordinator for that site
7. Data from the form included in the annual clerkship evaluation report

CORE-ELMS Applications

Procedure Overview:

1. 60 days in advance, send a reminder to the individual student (if no requests)
2. Open CORE-Elms clerkship smart-match for students, limiting the number of preferential choices
3. The student requests a rotation in the portal
4. Coordinators ensure a minimum of one rotation with D.O., In-patient experience, and rotation in GME setting.
5. Run Clerkship smart-match
6. Hand-slot any unmatched students into available slots at each site; verifying a minimum of one required rotation with the D.O., In-patient, and GME requirements

CORE REPORT for CLERKSHIP REQUIREMENTS

Procedure Overview:

1. Reporting>Reporting Suite
2. Select Student Schedules Matrix (Rotation Types) (NEW)
3. Select Student Program
4. Select Student Location
5. Grad Year
6. Select Rotation Types: In-Patient, GME
7. Run Report
8. Verify each student schedule includes rotation with In-patient, and GME
9. Hand slot, when requirements are not met

CORE Preceptor Credentialing

Procedure Overview:

1. Check for affiliation agreement, C.E. Specialist to initiate if none exists or expired
2. Send Clinical Faculty preceptor application and affiliation agreement for completion/signature
3. **Email:** Include the following attachments and links:

- A. Individual Preceptor Affiliation Agreement

- B. W-9 Form
- C. Personal Information Form
- D. Faculty Recommendation (Letter of Recommendation)
- E. A current copy of your CV

Please review the following Training videos and documents to familiarize yourself with preceptor expectations:

- A. **REQUIRED** Training Video 1: Title IX (*link to be added when developed*)
- B. **REQUIRED** Training Video 2: FERPA- Student Privacy (*link to be added when developed*)
- C. Training Document 1: CHSU COM Your Role as a Preceptor
- D. Training Document 2: Becoming a One Minute Preceptor: 5-Step Microskills Model of Clinical Teaching
- E. Training Document 3: Integrating the Learner into the Busy Office Practice
- F. Training Document 4: Sample Syllabus

- 4. Review, complete, verify and obtain signature(s) on application(s)
- 5. Go to C.E. Database, Select View/Edit Clerkships, Indicate Clerkship Status, Awaiting Review
 - a. Select Administrator, Class Year and Find Record(s)
 - b. Select Course (Course code should coincide with Clerkship Type)
 - c. Identify Total Days
 - d. Enter Clerkship Type, should fit with Course Code used
 - e. Enter Block # should not be duplicated.
 - f. Assign Course Credit Hours
 - g. Assure Preceptor is not duplicate already in system
 - h. Select Edit Preceptor Information
 - i. Verify: Spelling of first and last name; Credentials: must be board certified D.O., M.D.
 - j. Enter and Verify Email address of Preceptor for evaluation to be sent
 - k. Enter and verify Board Certification using primary source verification
 - l. Enter and verify State License (See License Verification SOP)
 - m. Enter and verify Hospital Affiliations

- n. Hospital: review notes on specific unique site requirements for immunizations and paperwork.

Clerkship Rotations

Procedure Overview:

1. Run CORE report for upcoming block rotation
2. Verify rotation slot assignments
3. Email preceptors/sites regarding upcoming rotation and availability
4. Verify student credentialing documents
5. Create and email student credentials and specialty syllabi to each Preceptor

Student Credentialing

Procedure Overview:

1. Review, complete, verify immunization form(s)
2. Generate and send immunization summary and drug screen
3. Generate and send a letter of good standing and verified background check
4. Generate and send medical liability
5. E-mail paperwork electronically to the hospital/preceptor contact; or print and mail or fax.
6. Save and upload finished/sent paperwork to the students' online database in CORE-Elms

Education Day

Procedure Overview:

1. Two-weeks prior:
 - a. Verify student sign-ups with topic
 - b. Email students who have not identified topic
 - c. Email all presenters to submit:
 - i. Oral Case Presentation PowerPoint
 - ii. Journal Club Article link
2. One-week prior:

- a. Email all students with the name of presenters and journal club article links
3. Day Of:
 - a. Assist with technical equipment
 - i. Have PPT and article links ready
 - ii. After each presentation, open the next presentation

Osteopathic Manipulation Medicine (OMM) Day & Clerkship Debrief

Procedure Overview:

1. Two weeks before the scheduled date:
 - a. Email reminder to sign up for OMM day
 - b. Reserve rooms for clerkship breakout sessions
 - c. Assign one clinical department member to each breakout session
2. One week prior:
 - a. Email the following documents:
 - i. Clerkship student evaluation of Preceptor
 - ii. Wellness Individual Learning Plan (WILP)
 - b. Email Dr. Yoshida the student sign-up list
3. Day of:
 - a. Provide hard copies of evaluations and WILPs on the day of
 - i. Have students complete if not received by email
 - b. Assist with room set up for Debrief
 - c. Ensure the room is clean afterward
4. Debrief:
 - a. At beginning of debrief session, break students into breakout groups by Clerkship
 - b. Coordinator for that breakout group takes group to designated breakout room
 - c. Coordinator for that breakout group facilitates debrief on the clerkship month with the students, utilizes 'site evaluation report' form.
 - i. GME at site
 - ii. IPE at site
 - iii. Any didactics available
 - iv. Student onboarding/credentialing process
 - v. OMM opportunities at the site

-
- vi. Library or other learning resources available
 - vii. Discuss adequacy of facility: student lounge, study space, safe storage space, call rooms, availability of food
 - viii. Discuss with students their experience, the adequacy of the facility, opinion of learning environment
 - ix. Discuss with students overall experience for the clerkship
-
- d. Data from breakout sessions given to lead coordinator for each site
 - e. Data from breakout sessions collated and included in annual clerkship report

COMAT Exams

Procedure Overview:

1. Send Registration (Enrollment) report to Registrar's office
2. Send the list to C.E. Exam Coordinator of any shelf exams that should be scheduled.
3. Send students a reminder about didactic schedules on campus
4. Enter Subject Exam scores into C.E. Database
5. Follow-up with students for test failure – possible schedule rearrangement
6. Send Director of C.E. the Retake list for tests for student failures

Clerkship Evaluations

Procedure Overview:

1. Send evaluation forms to preceptors (link generated in CORE-Elms)
2. Send a reminder to the Preceptor to complete eval if not received – follow up every week (phone, fax, email)
3. Re-type paper copy evaluations received by email/mail into C.E. Database
4. Assure Student Evaluation of Preceptor and Student Evaluation of Clerkship is completed by students
5. Send reminders to those that have not completed Student Evaluation of Preceptor and Student Evaluation of Clerkship

6. Note any failing grades or concerning comments on Preceptor Evaluation of Student and bring to attention of Associate Dean for Clinical Affairs
7. Note any 'red flag' questions answered in Student Evaluation of Preceptor or Student Evaluation of Clerkship.
 - Any red flag answers should be brought to the Associate Dean for Clinical Affairs immediately
8. Collate data from evaluations into monthly clin-ed departmental reports.

Preceptor Payment

Procedure Overview:

1. Release grade to the registrar
2. Payment request released for preceptor payment
3. Preceptor CME calculated/letters mailed or uploaded

Fourth-Year Preparation

AAMC Visiting Student Learning Opportunities (VSLO) Program

The VSLO program enables medical students to pursue short-term learning opportunities in the United States and Globally. The program supports students through the process of searching for electives, submitting applications, and completing their resulting educational experience(s). The VSLO program includes:

- Educational opportunities, including pre-clinical, community-based global health, research, and clinical opportunities.
- The application service called the Visiting Student Application Service (VSAS) which allows students to search and apply for opportunities

Visiting Student Learning Opportunities (VSLO) is sometimes referred to as VASA. The AAMC will email students with the subject line titles VSAS: New User Instructions. The email will include an access code along with further instructions. VASA is designed to allow students to apply to 4th-year (Allopathic) elective rotations. Third-year students will begin to plan for the 4th-year schedule in December of 3rd-year.

Visit the AAMC website to find more information about VSLO, including how it works, things to know, and fees for the service. AAMC links:

- [For Students Webpage](#)
- [How to Use the VSAS Application Service](#)
- [VSLO Program Guide](#)

Letters of Recommendation (LoR) for the Visiting Student Learning Opportunities

VSLO may require a letter of recommendation for some clerkships. Letters must be sent to the CHSU Clinical Clerkship Coordinator. The CHSU Clinical Clerkship coordinator will upload those letters into VSLO.

Procedure Overview:

1. Grant students access to VSLO
2. Email notification to students: notify students they will receive an email with subject line titled VSAS: New User Instructions, from the AAMC
3. Check the Visiting Students Application System (VSAS) for locations using VSAS
4. Update Status of clerkship to Approved and select Update
5. Click Show Schedule to review for duplicate block entries
6. Five-days after the start of the rotation assure student has registered in the portal

ASSESSMENT AND COMPARABILITY PROCESS

Process overview:

The purpose of this process is to ensure students have a rigorous clinical educational experience that meets the core educational learning objectives of the university and is comparable across all core educational sites, regardless of where students rotate. CHSU-COM has a rigorous and iterative process for assessment of its clinical education experiences and outcomes.

There are four elements integral to this process and include:

1. Curricular requirements:
 - a. clearly defined clinical conditions that students should see, as defined by the faculty via the clinical education subcommittee of the curriculum committee,
 - b. clerkships with the same syllabi and learning objectives, regardless of site,
 - c. consistent university global learning objectives throughout the clerkship syllabi,
 - d. opportunities for utilization of osteopathic principles and practice which are available.
2. Standardized learner assessments and grading processes across sites:
 - a. guidelines for grading defined by the clinical education subcommittee of the curriculum committee,
 - b. a standardized EPA-based evaluation form across all clerkships,
 - c. electronic tracking of patients and conditions seen on rotation,
 - d. a mid-clerkship feedback communication to identify progress toward curricular requirements with a plan for addressing gaps,
 - e. available electronic cases/OSCEs as a back-up plan for selected conditions or procedures not encountered on rotation.
3. Monthly analysis of outcomes:
 - a. reviewed by clinical education staff,
 - b. annual clerkship analysis of outcomes cumulatively and across sites by the Associate Dean of Clinical Affairs,
 - c. presentation of data to the curriculum committee and the university's institutional effectiveness department.

4. Infrastructure:

- a. data collection and monitoring, including the student information system and learning management system.

The process involves clear communication of the expectations and required elements between the clinical education department and the site preceptors. Communication will occur at the initial orientation meeting, semi-annually as preceptor evaluation reports are provided to preceptors, and annually as the clerkship director shares annual clerkship academic report data with preceptors.

Monthly clerkship review is conducted by the clinical education staff, with immediate action taken if necessary. Annual clerkship analysis cumulatively and across sites occurs by the associate dean of clinical affairs with an annual report presented to the curriculum committee. Feedback and recommendations from the curriculum committee are relayed to the associate dean and clinical education subcommittee to implement recommended clerkship modifications.

The clerkship review process is repeated annually, with data, findings, trends, and recommendations discussed at the annual clinical education retreat. The retreat provides a forum for safe yet public discussion of critical areas that need improvement, discussing successful practices from other clerkships or sites for possible reproduction.

ACADEMIC YEAR-FOUR

Clerkship Rotations

Procedure Overview:

1. Run CORE report for upcoming block rotation
2. Verify rotation slot assignments
3. Verify student credentialing documents

PROCEDURE STEPS IN DETAIL

CREDENTIALING PRECEPTORS

All physicians who serve as preceptors for CHSU COM students must be board certified (B.C.) or board eligible (B.E.) by ABMS or AOA. In addition, to the BC/BE requirement, **all preceptors must be credentialed and have a faculty appointment with CHSU COM.**

Clerkship Definition: a course of clinical medical training in a specialty (as pediatrics, internal medicine, or psychiatry) scheduled in four-week blocks and takes place during the third or fourth year of medical school training.

Preceptor Definition: The Preceptor guides the student's clinical learning experience, facilitates student autonomy, and acts as a role model; this experience is facilitated in a private office, clinical, or hospital setting.

Credentialing Definitions:

- **DCA:** Department of Consumer Affairs
 - Utilized for C.A. license verification and expiration date
- **FSMB:** Federation State Medical Board

- A.K.A. FCVS: Federation Credentials Verification Service
- Verifies Physicians and Physician Assistants
- D.O. may be certified through this system; however, some may not appear, and AOiA report is then required
- Report Fee: \$2.50 per
- **AOiA: American Osteopathic Association**
 - Utilized for D.O. Board Certification verification
 - Log in access given to Bobbie Lujan
 - Report fee: \$8.00 per
- **ABMS: American Board of Medical Specialties**
 - Board certification of specialty-specific training beyond medical licensure

Requirements for Preceptor Credentialing

Credentialing a preceptor requires:

1. A current CV, required Personal Information and Faculty Recommendation
 - a. Obtained/created by the coordinator and documented/stored in CORE
 - b. CV's may be obtained by the DSME, coordinator, or student asking the Preceptor for the CV, the medical education department providing the CV, or other means.
 - c. If CV is not available, a brief CV may be created using the COM CV Template.
 - d. Required preceptor information entered in CORE by the coordinator:
 - i. First Name
 - ii. Last Name
 - iii. Middle Initial (if applicable)
 - iv. Credentials
 - v. Gender
 - vi. Phone Number
 - vii. Address; City; State; and Zipcode
 - e. Custom Data
 - i. Affiliation agreement type

- ii. CV
 - iii. Specialty
 - iv. Faculty Recommendation
- 2. Current Affiliation agreement
 - a. Obtained by the coordinator and stored in the database
- 3. Verification of the medical license and board certification
 - a. Completed by the designated coordinator; stored in the database

Procedure Steps:

- 1. **Process: FSMB and AOA** payment through the portals, receipts are emailed to Bobbie Lujan
 - a. Note the invoice code and reason
- 2. Obtain signature from the Clinical Affairs Director
- 3. Submit to Jessica McCune
- 4. Print, note the invoice code and reason
 - a. 1st point of contact is Jessica McCune
 - b. Jessica McCune and Jory McCune both have a card

Clinical Faculty Appointment and Approval

Procedure Steps:

1. Associate Dean of Clinical Affairs will review:
 - a. CV
 - b. Clinical Faculty Request
 - c. Faculty Recommendation
2. Approvals will be forwarded to the Dean with the recommendation for initial rank.
3. Preceptor's will be notified by letter with the Dean's signature.

Contingency Plan

Procedure:

In the event that a clinical education experience becomes unavailable for a student, the following process will be followed:

1. Communication with the site/preceptor by clinical education team member
 - A. Does the change involve a single preceptor or an entire site?
 - B. Anticipated length of the change: Temporary or Permanent
 - C. Are there any substitute willing preceptors available at the site?
2. Clinical education team examines the feasibility of the following solutions
 - A. When a single preceptor affected at a site with multiple preceptors
 - i. Current student
 1. Second preceptor takes involved student
 2. Remaining preceptors at that site rotate taking the involved student
 3. If site has students on shifts, ascertain if student could be assigned to a different shift
 4. Assign student to any available preceptor in that specialty with a vacancy
 5. Assign student to a preceptor in that specialty at another site willing to take additional student

6. Communicate with preceptors from contingency list willing to take students
 - a. When preceptor identified, credential preceptor if not already done
 - b. Assign student to preceptor from contingency list
7. If student past week two of rotation, assign virtual curriculum for remainder of rotation
- ii. Future students
 1. Remaining preceptors at that site assigned additional students
 2. Remaining preceptors at that site rotate having time with additional students
 3. Shift compression or modification to accommodate additional students
 4. Assign students to available preceptors in that specialty with vacancies
 5. Assign students to preceptors at another site willing to take multiple students
 6. Communicate with preceptors/sites from contingency list willing to take students
 - a. When preceptor identified, credential preceptor if not already done
 - b. Assign student to preceptor from contingency list
 7. Evaluate student and preceptor schedules for next few blocks to identify any potential movement of student rotations to switch to available preceptors
 8. Consider available elective rotation for students
- B. When a single preceptor is affected at a site where they are the solo preceptor
 - i. Current student
 1. Assign student to any available preceptor in that specialty with a vacancy
 2. Assign students to preceptors willing to take multiple students
 3. Communicate with preceptors/sites from contingency list willing to take students

- a. When preceptor identified, credential preceptor if not already done
 - b. Assign student to preceptor from contingency list
 4. If student past week two of rotation, assign virtual curriculum for remainder of rotation
- ii. Future students
 1. Assign students to available preceptors in that specialty who have vacancies
 2. Assign students to preceptors who are willing to take multiple students
 3. Communicate with preceptors/sites from contingency list willing to take students
 - a. When preceptors identified, credential preceptor if not already done
 - b. Assign student to preceptor from contingency list
 4. Evaluate student and preceptor schedules for next few blocks to identify any potential movement of student rotations to switch to available preceptors
3. Consider available elective rotation for students

Scheduling, Preceptor Availability and Providing Student Credentials

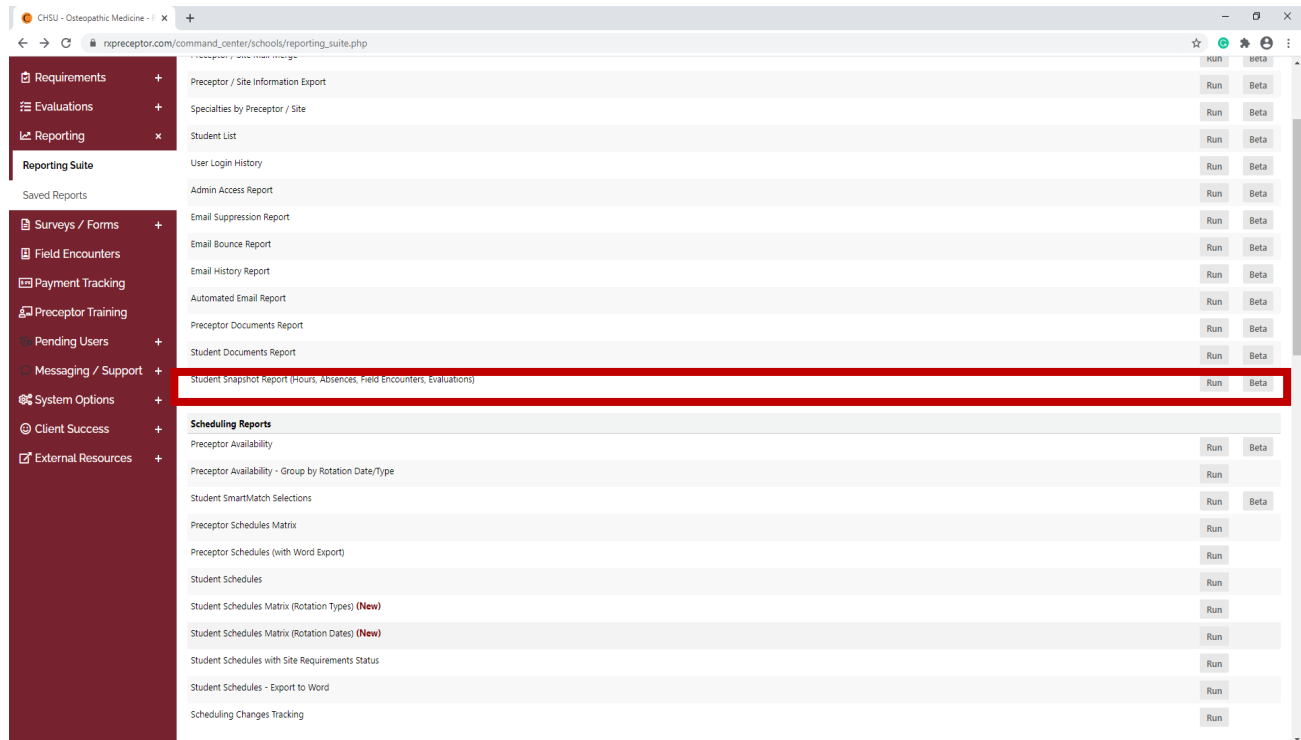
Introduction:

Clerkship block rotations are scheduled with hospitals, individuals, and medical groups; four-weeks prior to the start of a block rotation, it is important to verify the site and preceptor availability. Contact information for preceptors and sites are in CORE ELMS software and SharePoint. All preceptors will receive an email with student credential documentation. For FERPA reasons, preceptors will receive an individual email on each student with documentation.

Procedure Steps:

Step 1- CORE Report:

1. Run report for the upcoming Block rotation.
 - a. Reporting Suite>Scheduling Reports>Student Schedule Matrix (Rotation Dates) New



2. Click, RUN
3. Select student program: (Cntrl & select: May select multiple at same time)
 - a. Osteopathic Medicine
 - b. Sponsored O.M. (ATSU)
 - c. Sponsored O.M. (KCU)
4. Select Student Location: California
5. Select Grad Year:

6. Rotation Dates: select (May select multiple at same time)

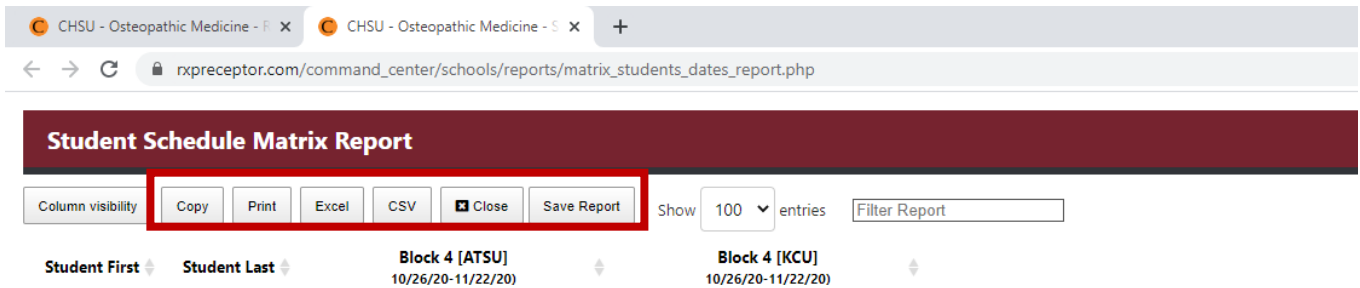
The screenshot displays the 'Student Schedules Matrix' interface within the CORE | ELMS system. The interface includes a sidebar with navigation options and a main content area with several filter sections. The 'Filter Schedules' section is expanded, showing 'Rotation Dates' and 'Required' sections. The 'Rotation Dates' section lists various date ranges for different classes and blocks. At the bottom, there are sections for 'Custom Fields' and 'Add Additional Columns/Info' with checkboxes for Student ID, Grad Year, Email, Phone, State, Program, Location, and CRN. A 'Run Report' button is at the bottom right.

7. Additional Columns/Info: check Show actual schedule dates

8. Select Run Report

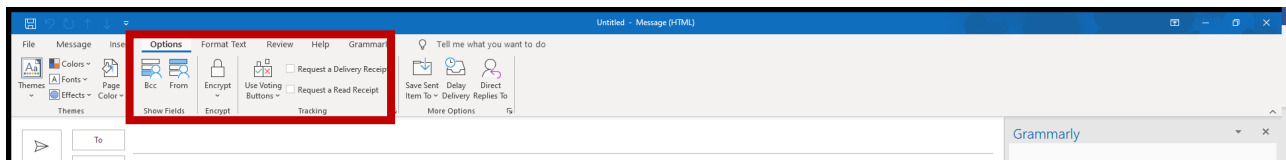
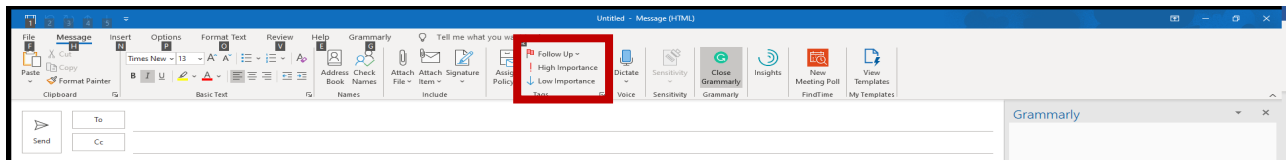
9. Option:

- a. You may print directly from report
- b. Convert to Excel, save and print



Step 2- Emailing Preceptor/Site(s):

1. Email Preceptors the Block schedule identifying student rotation dates and credential documents
2. Identify email:
 - a. High Importance
 - b. Request read email receipt



3. Cc: Clin-Ed Team, Dr. VanGarsse, and student
4. Email Template:

EMAIL EXAMPLE

Hello Dr. **Name!**

Thank you for agreeing to be a preceptor for CHSU and having our visiting student Dr. **last name**, Block-Four Rotation **enter rotation dates**, join you for **his/her enter specialty** rotation. Our team is excited to work with you! Please see your schedule below for the upcoming rotation. If you have any questions or concerns regarding this schedule, please contact me ASAP.

Attached to this email are the following student credential documents:

Student	LOG	White Coat	Eval	Certs & IRs	Liability	Syllabus	Rotation dates
name	✓	✓	✓	✓	✓	Enter specialty	Dr. name

I have copied student Dr. **last name**, on this email as well, and **he/she** will be reaching out before **his/her** rotation start date for start time/rotation details.

The Clinical Education Team truly appreciates your time and attention to our students as they continue their medical school education! Should you have any questions or concerns, please contact a Clin-Ed Team member or the Regional Assistant Dean, Dr. Anne VanGarsse (Avangarsse@chsu.edu).

Step 3- Accessing Student Documents to include with email

1. Student credentialing documents:
 - a. Sharepoint>Department>Students>Choose Grad Year Folder, click on individual student folder to download for:
 - i. Letter of Good Standing (LOG)
 - ii. Student White Coat Photo
 - iii. Student Clinical Performance Evaluation Form
 - iv. Student Certifications and Immunization Form (I.R.s)
 - v. Student Certificate of Liability Insurance
 - vi. Electronic Signature Declaration (CRMC only)
 - vii. Specialty Syllabus: Sharepoint>Department>Students>Grad Year> (ATSU, KCU)>Syllabus
2. Insert all documents to email
3. Complete steps for each Preceptor and student(s)

Community Regional Medical Center

1. **Email 1:** Pam Nunes, Community Hospitalist Medical Group-Program Coordinator
 - a. Pam Nunes
PNunes@santehealth.net
 - b. For the Santee for preceptor schedule (2 students per block)
 - c. **Email template:**
Sharepoint>Department>Clinical Rotation>Credentialing>CRMC-Fresno Heart Credentialing>Email Templates

EMAIL EXAMPLE:

Good Afternoon, Pam!

I hope all is well with you!

We have a Block rotation coming up beginning 8/31 through 9/27. I am reaching out to identify which of the following Hospitalists will working at CRMC/Fresno Heart within the specified date range:

Dr. Shada Attraplsi

Dr. Patrick Louis-Jacques

Dr. Kalavagunta Satish

Dr. Ria D'Souza

Dr. Sundeep Grewal

Sincerely,

2. **Email 2:** Once response has been received, call and email each Preceptor inquiring if they would like student(s) for the dates indicated.
3. **Email 3:** Once responses have been received from preceptors, email Carmen (Angela) Vasquez, Medical Staff Coordinator:
 - a. CVasquez4@communitymedical.org
 - b. Regarding student credentialing and onboarding
 - c. **Email template:** Sharepoint>Department>Clinical Rotation>Credentialing>CRMC-Fresno Heart Credentialing>Email Templates> Internal Medicine Rotation (8/31 - 9/27)
 - d. **Attach Preceptor Affiliation Agreement**
 - i. Sharepoint>Department>Clinical Affairs>Affiliation Agreements> select folder for individual preceptor
 - e. **Attach the student credentials**
 - i. Sharepoint>Department>Students>Choose Grad Year Folder, click on individual student folder for:
 - ii. Letter in Good Standing (LIG)

- iii. Student White Coat Photo
- iv. Student Clinical Performance Evaluation Form
- v. Student Certifications and Immunization Form
- vi. Student Certificate of Medical Liability Insurance
- vii. Electronic Signature Declaration (CRMC only)
- viii. Seasonal Flu
- ix. Specialty Syllabus: Sharepoint>Department>Students>Grad Year> (ATSU, KCU)>Syllabus
- f. **Email Template:** Sharepoint>Department>Clinical Rotation>Credentialing>CRMC-Fresno Heart Credentialing> Email Templates> Rotation Arrangements Background needed

Vascular surgery rotation

1. For those students who completed an Internal Medicine rotation with CRMC/CHMG, request to extend badge access for rotation.
2. **Email:** Carmen Vasquez CVasquez4@communitymedical.org, for credentialing/onboarding.
 - i. When a student is rotating with Dr. Stern, identify in the email the student will need badge access to the following:
 1. **CRMC**
 - a. Dept of Surgery Office
 - b. Cath lab
 2. **Fresno Heart**
 - a. OR
 - b. Doctors Lounge
3. **Repeat steps**

Preceptor/Student Scheduling

Four Weeks Prior to Rotation Start:

1. Run CORE report for Block Rotation
2. Verify preceptor assignments

Three Weeks Prior to Rotation Start:

1. Create Draft EMAILS: include student credential documents
 - a. Retrieved from SharePoint>
 - i. Rotation evaluation
 - ii. Letter of/in Good Standing (LOG or LIG)
 - iii. Medical Professional Liability
 - iv. White Coat Photo
 - v. Immunization record and flu shot
 - vi. Syllabus for specialty

Two Weeks Prior to Rotation Start:

1. EMAIL: Preceptor (and office manager) student credentials and dates of rotation; CC student doctor

One Week Prior to Rotation Start:

1. EMAIL: reminder to student doctors to contact preceptors regarding start time and rotation details.

Special Notation:

Dr. Dhillon (I.M. rotation) completes a one-week hospital rotation without the student

Hospital Rotation: Kaweah Delta Medical Center in Visalia

- Need to schedule a second preceptor or provide an online option
- The student will contact the Clinical Ed department regarding which week he/she will not be with Dr. Dhillon

BLOCK SCHEDULING

Community Hospitalist Medical Group AND Community Regional Medical Center

Preceptor Scheduling and Availability:	Student Credentialing:
Pam Nunes, Program Coordinator	Carmen (Angela) Vasquez
Ph: 559.228.4253	Email: Carmen Vasquez
Fax: 559-228.4299	CVasquez4@communitymedical.org
Email: PNunes@santehealth.net	

Four Weeks Prior to Rotation Start:

3. Run CORE report for Block Rotation
4. Verify preceptor assignments
5. EMAIL: Preceptor schedule and availability
 - a. Pam Nunes: PNunes@santehealth.net
 - b. IM rotations may have multiple preceptors assigned to one student
 - c. When preceptor availability has been received, email preceptors regarding if they are interested in taking a student for the dates of the rotation
 - d. Print a blank calendar for the dates of the block rotation
 - i. Schedule each Preceptor; preceptors may be rotated weekly
 - ii. Identify the number of days each Preceptor is scheduled
 1. Preceptors are paid \$50.00 per day per student
 2. Refer to pg. 3 for example
3. EMAIL: Carmen Vasquez CVasquez4@communitymedical.org
 - a. Email Carmen the following credential documents for each student:
 - i. Retrieve from SharePoint>CHSU Org>College of Osteopathic Medicine>Clinical Affairs>Department>Students> by grad year folder
 - ii. Retrieve from CORE>Student>Documents

STUDENT CREDENTIALING DOCUMENTS

1. Master Clinical Rotation Application	6. White Coat Photo
2. Electronic Signature Declaration	7. Immunization record
3. Rotation evaluation	8. Flu shot
4. Letter of/in Good Standing (LOG or LIG)	9. Syllabus for specialty
5. Medical Professional Liability	10. Volunteer Handbook <ul style="list-style-type: none"> 1. Acknowledgement of HIPPA 2. True/ False Questions 3. Target 100 Standards 4. Confidentiality Agreement & Acknowledgement 5. Volunteer Signature Page

Three Weeks Prior to Rotation Start:

1. Student Credentialing
 - a. EMAIL: Carmen Vasquez a follow up email regarding status of credentialing
 - i. A confirmation email will be sent when students are cleared; email will contain instructions for badge pickup with CRMC.
 - b. EMAIL: students' instructions with their White Coat photo

Two Weeks Prior to Rotation Start:

1. EMAIL: Preceptors with student credentials and date of rotation; CC student doctor
2. **Schedule EPIC training**
 - a. Text Marilyn Greene at 559-259-5364 (infosec dept at CRMC) and let her know X number of students will be starting on X date at the hospital. Request an EPIC training link for the students (provide in your email)
 - b. She will send you the training link through an Outlook calendar invite forward to students.
 - i. Accept calendar invite (keep information in case students need assistance)
 - ii. Forward to students

- i. **NOTE:** Only forward Outlook calendar invites to first time students (IM or Surgery rotations) rotating with CHMG/CRMC

One Week Prior to Rotation Start:

1. **EMAIL:** reminder to student doctors to contact preceptors regarding start time and rotation details.

CALENDAR EXAMPLE

October 2020

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
	28 Sargsyan (2) =\$100	29 Sargsyan (2) =\$100	30 Louis-Jacques (2) = \$100 Satish (2) = \$100	1 Louis-Jacques (2) = \$100 Satish (2) = \$100	2 Louis-Jacques (2) = \$100 Satish (2) = \$100	3
4	5 Louis-Jacques (2) = \$100 Satish (2) = \$100	6 Louis-Jacques (2) = \$100 Satish (2) = \$100	7 Sargsyan (2) =\$100 D'Souza (2) =	8 Sargsyan (2) =\$100 D'Souza (2) =	9 Sargsyan (2) =\$100 D'Souza (2) =	10
11	12 Sargsyan (2) =\$100 D'Souza (2) =	13 Sargsyan (2) =\$100 D'Souza (2) =	14 Louis-Jacques (2) = \$100 Satish (2) = \$100	15 Louis-Jacques (2) = \$100 Satish (2) = \$100	16 Louis-Jacques (2) = \$100 Satish (2) = \$100	17
18	19 Louis-Jacques (2) = \$100 Satish (2) = \$100	20 Louis-Jacques (2) = \$100 Satish (2) = \$100	21 Sargsyan (2) =\$100 D'Souza (2) =	22 Sargsyan (2) =\$100 D'Souza (2) =	23 Sargsyan (2) =\$100 D'Souza (2) =	24
25	26	27	28	29	30	31
Sargsyan= \$1,000 Louis-Jacques= \$1000 Satish= \$1000						

Dr. Prophete (OB/GYN rotation)

Point of Contact: Office Manager Brenda

EMAIL: bren_cmg@yahoo.com

Hospital Rotation: Sutter Health and the hospital is Memorial Hospital, Los Banos CA

Four Weeks Prior to Rotation Start:

1. Run CORE report for Block Rotation
2. Verify preceptor assignments
3. EMAIL: Preceptor (and office manager) regarding availability and interest in taking a student during the dates of rotation, when confirmation received complete Sutter Health My Clinical Exchange invoice process

Three Weeks Prior to Rotation Start:

Sutter Health: My Clinical Exchange (MCE)

- a. Follow instruction sheet
- b. Several emails will be sent through out process and may take some time to complete all steps
- c. Need CHSU credit card for payment
 - i. \$39.50 per student
 - ii. Download and save invoice
- d. Roster TEMPLATE: will be emailed after payment was received
 - i. Follow instructions provided in email
- e. Match students to paid invoice; wait for confirmation email stating they are cleared
4. **EMAIL:** Students to look for MCE email; if they do not receive it to look in their junk mail.
5. **KCU and ATSU Clerkship and CHSU reimbursement**
 - a. Request credentialing fee invoice for reimbursement for KCU/ATSU students
 - b. EMAIL: Sidra@chsu.edu
 - i. Include roster and paid invoice

- c. KCU EMAIL: Valorie Millican Vmillican@kcumb.edu and Michelle Houser
MHouser@kcumb.edu
 - i. the CHSU check request with MCE invoice and roster
- d. ATSU EMAIL: Tammy Kriegshauser, Director of Clinical Affairs
tkriegshauser@atsu.edu
 - i. the CHSU check request with MCE invoice and roster
- 6. Create Draft EMAILS: include student credential documents
 - a. Retrieved from SharePoint>
 - i. Rotation evaluation
 - ii. Letter of/in Good Standing (LOG or LIG)
 - iii. Medical Professional Liability
 - iv. White Coat Photo
 - v. Immunization record
 - vi. Syllabus for specialty

Two Weeks Prior to Rotation Start:

- 1. EMAIL: Preceptor (and office manager) student credentials and dates of rotation; CC student doctor

One Week Prior to Rotation Start:

MCE TASK COMPLETION:

- 1. Log in
- 2. On blue menu bar, top of screen, click on the icon: blue person>search>student and click the "search" tab

myClinicalExchange
McNealy, Tamara: California Health Sciences University
Rotation | Administration | Reports |

University: California Health Sciences University
Clinical Group: --Select--
First Name:
Degree/Cert.: No Degree(s) Selected
Active Only? ☒
Program: Osteopathic Medicine
PID:
Last Name:
Cohort: --Select--

Search

You are here: Student Search
Search
Student
Instructor

Name	Address	Email	Phone	Program	Degree	Cohort	Anticipated Completion Term?	Pymnt. Expires	Pymnt. Expires Date	Active?

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a. Click on student name

myClinicalExchange
McNealy, Tamara: California Health Sciences University
Rotation | Administration | Reports |

University: California Health Sciences University
Clinical Group: --Select--
First Name:
Degree/Cert.: No Degree(s) Selected
Active Only? ☒
Program: Osteopathic Medicine
PID:
Last Name:
Cohort: --Select--

Search

Search returned 11 rows

Name	Address	Email	Phone	Program	Degree	Cohort	Anticipated Completion Term?	Pymnt. Expires In	Pymnt. Expires Date	Active?
Campat, Christian Anthony	285 N Amedeo Ln, Clovis, CA 93611	ccampat@kcumb.edu	8056125183	Osteopathic Medicine				335 Days	09/21/2021	✓
Catherine, Liu	6704 kenmar way, san diego, ca 92130	catherinelu@kcumb.edu	8587741249	Osteopathic Medicine				273 Days	07/21/2021	✓
Dorfman, Edward Ross	263 N Amedeo Lane, Clovis, CA 93611	edward.dorfman@kcumb.edu	3235280811	Osteopathic Medicine				357 Days	10/13/2021	✓
Garcia, Jose Antonio	1821 E Spruce Ave 280, Fresno, CA 93720	jagarcia@kcumb.edu	2095856418	Osteopathic Medicine				357 Days	10/13/2021	✓
Gozum, Dale		sa199850@atsu.edu		Osteopathic Medicine				322 Days	09/08/2021	✓
Kamboj, Rabia	26595 29 ave, Langley, BC V4W 3B3	rabia.kamboj@kcumb.edu	4173962819	Osteopathic Medicine				273 Days	07/21/2021	✓
Ky, Tyler Chuan Sheng Kenji	285 N Amedeo Ln, Clovis, CA 93611	tylerky@kcumb.edu	8086272302	Osteopathic Medicine				300 Days	08/17/2021	✓
Lim, Mike Louis	310 N Amedeo Ln 285A, Clovis, CA 93611	mikelim@kcumb.edu	5103969390	Osteopathic Medicine				273 Days	07/21/2021	✓

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b. Click on Clinical tab, then thumb icon, to verify module and exam completion:

The screenshot shows the 'myClinicalExchange' Student Search page. The top navigation bar includes 'Navigation | Administration | Reports |'. The main content area is titled 'Personal Details' and contains a form for a student named Edward Ross Dorfman. The form includes fields for First Name, Middle Name, Last Name, PID, Gender, Ethnicity, and Active status. Below the form are buttons for 'Email Student', 'Update', and 'Back to Search'. A table below the form lists clinical rotations. The first row shows a rotation at Memorial Hospital Los Banos, Graduate Nursing, Nurse Practitioner, with attendance of 8.00 / 8.00 and a rotation period from 08/03/2020 to 04/25/2021.

Clinical	Checklist	Assessment	Contact	Program Enrollment	Documents	Emails/Notes	Photo
Rotation #	Period	Preceptor/Hub	Scholar	Facility	Prog.	Dept	Unit
243182	08/03/2020 - 04/25/2021			Memorial Hospital Los Banos	Graduate Nursing	Nurse Practitioner	8.00 / 8.00

c. Click on the Modules Tab:

The screenshot shows the 'Compliance Requirements for Dorfman, Edward Ross' page. The top navigation bar includes 'Compliance(1)', 'Documents(5)', 'Modules(6)', and 'Exams(4)'. The 'Modules' tab is selected. Below the tabs is a table with columns for Status, Item, Value, Comments, and Supporting Docs. The first row shows 'Rotational Compliance Checklist (Valley Area) Memorial Hospital Los Banos' with a status of 'Not attested'. Below the table is a section for 'Checklist Attestation' with a text area for comments.

Status	Item	Value	Comments	Supporting Docs.
Not attested	Rotational Compliance Checklist (Valley Area) Memorial Hospital Los Banos			

d. Screen shot section if modules are not completed; insert into an email.

The screenshot shows the 'Compliance Requirements for Dorfman, Edward Ross' page. The top navigation bar includes 'Compliance(1)', 'Documents(5)', 'Modules(6)', and 'Exams(4)'. The 'Modules' tab is selected. Below the tabs is a table with columns for Modules, Valid To, and Remark. The table lists several modules, including 'EHR Training', 'General Compliance Training for Clinical Students & Job Shadowing (videos)', 'Privacy and Information Clinical Student Training', 'Student Experience Regulatory Training', 'Sutter Health Student and Instructor Workforce Confidentiality Acknowledgement', and 'Sutter Health Workplace Violence (videos)'.

Modules	Valid To	Remark
EHR Training		
General Compliance Training for Clinical Students & Job Shadowing (videos)		
Privacy and Information Clinical Student Training		
Student Experience Regulatory Training		
Sutter Health Student and Instructor Workforce Confidentiality Acknowledgement		
Sutter Health Workplace Violence (videos)		

e. Click on Exams tab, Screen shot section if modules are not completed; insert into an email.

Exams	Valid Till	Total Attempts	Completed On	Result
General Compliance Training for Clinical Students & Job shadowing		0		
PT training for Clinical Students		0		
Workplace Violence		0		
Workforce Confidentiality Acknowledgement		0		

- f. Click "Check List" tab, then click "Osteopathic Medicine Compliance Checklist (CHSU)"

Personal Details

School: California Health Sciences University

First Name: Edward, Middle Name: Ross, Last Name: Dorfman

Maiden Name: , PID: , Ethnicity: White, Active: ☒

Currently employed at: Select Organization, Hired on completion by: Select Organization

Buttons: Email Student, Update, Back to Search

Tabs: Clinical, **Checklist**, Assessment, Contact, Program Enrollment, Documents, Emails/Notes, Photo

Checklist	Status
Osteopathic Medicine Compliance Checklist(CHSU) (California Health Sciences University)	
Rotational Compliance Checklist ((Valley Area) Memorial Hospital Los Banos)	

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- g. Copy entire section if modules are not completed; **insert into an email.**
- h. Send email to student with the following in subject line:
- i. IMMEDIATE ACTION REQUIRED: My Clinical Exchange Check List Task, Modules and Exams
 - i. Once all items have been completed, complete the Checklist Attestation:
 - i. Home screen, click on "Schld" column then #

Alert: You have pending compliance-items submitted by one or more student(s) for review; Click here to continue:

Hospital	Req. #	Req. Date	Period	Degree	Cohort	Course	Program	Opment	Unit	A/B	Schld	Status	Student
(Valley Area) Memorial Hospital Los Banos (1)	308369	07/08/2020	08/03/20 - 04/25/21	DO			Graduate Nursing	Nurse Practitioner	Rural Clinic	20/20	10	Approved	
(Valley Area) Sutter Gould Medical Foundation (1)	294140	03/20/2020	12/14/20 - 01/10/21	DO			Medical Student	Pediatrics - Modesto		0/1		Waiting on Hospital	

j. Check box and click "Attest"

Schedule students for Request # 308369

Rotation # - Period: 243182 - (08/03/20 - 04/25/21)

Facilities for Rotation #243182

Facility	Period	Department	Unit	Shift	Openings	Total Hrs.	Rot. Days	Preceptor/Staff
Memorial Hospital Los Banos	08/03/2020 - 04/25/2021	Nurse Practitioner		Day (8 Hrs.)	20	8	8/3, 4/25 ...	

Students scheduled in Rotation #243182

Student	Email	Assigned On	Assigned By
(A) Campat, Christian Anthony	ccampat@kcumb.edu	09/21/20	Lujan, Bobbie
(A) Catherine, Liu	catherinelu@kcumb.edu	07/21/20	Reyes, Vanessa
Dorfman, Edward Ross	edward.dorfmankcumb.edu	10/13/20	McNealy, Tamara

Attest Email Associate Unit To Students

Student Search Criteria

- University: California Health Sciences University
- Program: --Select--
- Clinical Group: --Select--
- PID:
- First Name:
- Last Name:
- Degree/Cert.: --Select--
- Cohort: --Select--
- Active Only? ☒

Search

3. **EMAIL:** reminder to student doctors to contact preceptors regarding start time and rotation details.

Check Request for Preceptor Payment

Introduction:

Two types of check requests for preceptor payment:

- PRHS I, II, III and IV course Guest Preceptor Speaker
- Block Preceptor for clinical rotations
- All preceptors must have on file an Affiliation Agreement and W-9

Guest Preceptor Speakers: After a guest preceptor completes a PHRS course session; verify with Clinical Affairs Director regarding budget and when to pay.

Block Preceptors: Check request are completed at the end of each student Block rotation; rotations may be either four or eight weeks in length. CHSU only pays preceptors for required course rotations for third- and fourth-year students.

3 rd -year required courses:	4 th -year required courses:
<ul style="list-style-type: none">• Family Medicine (two rotations)• Internal Medicine (two rotations)• General/Subspecialty Surgery (two rotations)• Pediatrics• OB/GYN• Mental Health	<ul style="list-style-type: none">• Emergency Medicine• Primary Care• Federally Qualified Health Centers (FQHC)• Medicine/Surgical/Pediatric Subspecialty

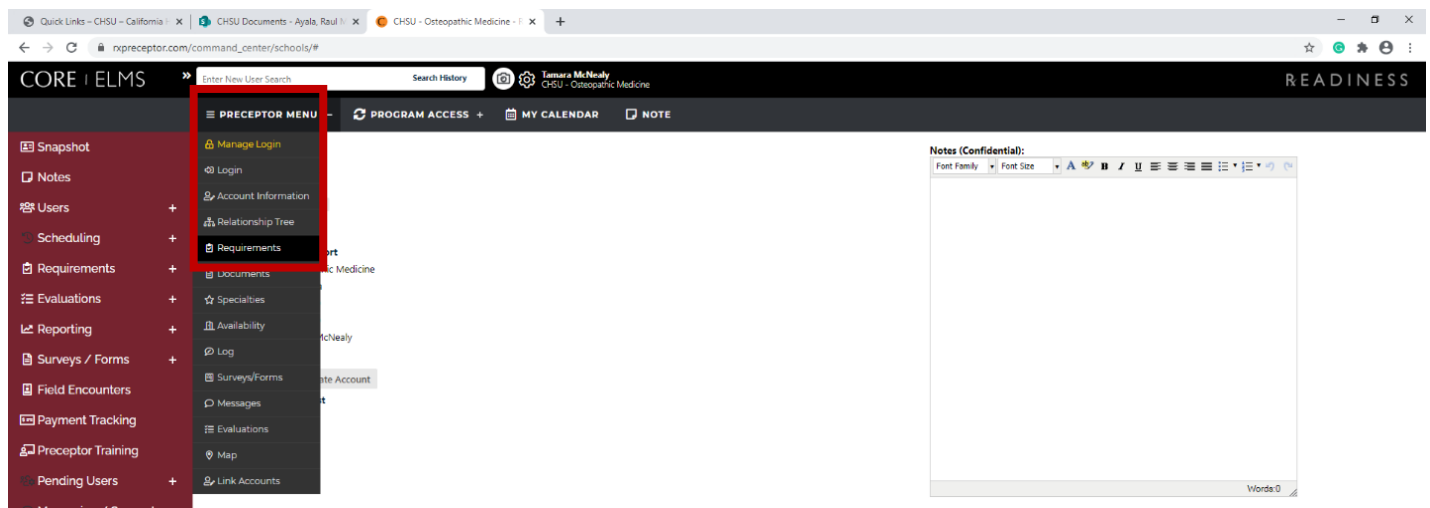
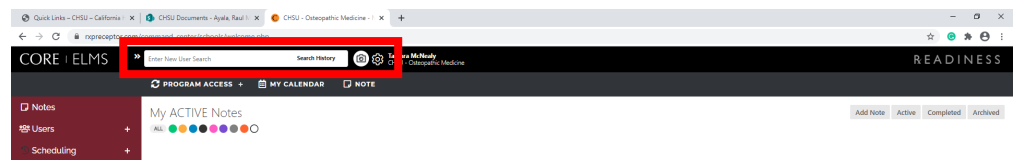
Procedure Steps: PRHS-I, II, III, IV Guest Preceptor Speakers and Block Rotations

1. **Verification:** Verify each Preceptor has completed the faculty affiliation agreement and W-9
 - a. **Option 1:** CHSU.EDU>Resources>Quick Links>CHSUDocs SharePoint>CHSU Org>College of Osteopathic Medicine>Clinical Affairs>Department>Preceptor Credentials> select by name:
 - i. Individual Preceptor Affiliation Agreement or CHSU Affiliation Agreement
Exhibit B

- ii. Clinical Preceptor Faculty Application (3)
 - 1. Personal Information
 - 2. Clinical Faculty Appointment Request
 - 3. Preceptor Recommendation
- iii. W-9 form

b. **Option 2:** CORE ELMS

- i. Log into CORE
- ii. Enter preceptor name in search bar
- iii. Select name
- iv. Click: Preceptor Menu
- v. Select: Requirements



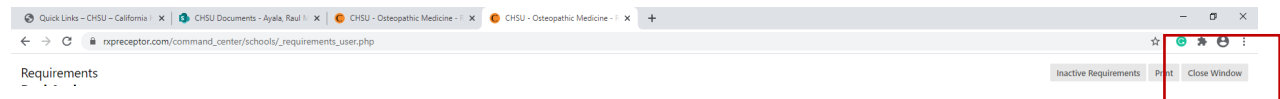
- vi. Locate: Clinical Preceptor Faculty Appointment Request Form and W-9
- vii. Select: View

Requirement details have been added.

Miscellaneous																	
Preceptor Requirements	File	Site	Mandatory	Completed	Completed Date	Date Added	Updated	In Progress	File	Form	Expiration	View	Confirm	Deny	Edit / Replace	Delete	Archive
Affiliation Agreement			Yes			09-17-20 11:32 AM	09-17-20		FILE			View	Confirm	Deny	Edit Current	Replace	Delete
Board Certification			Yes	Yes		09-17-20 11:35 AM	09-17-20		FILE			View	Confirm	Deny	Edit Current	Replace	Delete
Clinical Preceptor Faculty Appointment Request Form	FILE		Yes			09-17-20 01:03 PM	09-17-20		FILE			View	Confirm	Deny	Edit Current	Replace	Delete
CV			Yes			09-17-20 11:33 AM	09-17-20		FILE			View	Confirm	Deny	Edit Current	Replace	Delete
Medical License			No			09-17-20 11:34 AM	09-17-20		FILE			View	Confirm	Deny	Edit Current	Replace	Delete
Supporting Letter of Recommendation	FILE		Yes												Edit Current		
W-9			No												Edit Current		

[Back to Top](#)

viii. Close window upper right-hand corner of screen



Procedure Steps: Completing the Check Request

1. **Check Request Form access:** CHSU.EDU>Resources>Quick Links>CHSUDocs SharePoint>CHSU Org>College of Osteopathic Medicine>Clinical Affairs>Department>Master Templates
2. **Payment Amount:**
 - a. **Guest Preceptor Speakers:** Verify with Director of Clinical Affairs the amount to be paid and when request should be emailed to accounting
 - b. **Block Preceptors:** receive \$1,000 per student, per rotation
 - i. **Special Note: Community Hospitalist Medical Group:** multiple preceptors may be utilized rotating with other preceptors. Utilize the calendar created when scheduling preceptors. Create one check for CHMG with total amount.
 1. **Email:** only the calendar with preceptor schedule and total amount to Pam Nunes
3. **Complete check request form:** utilize the information from the Preceptor W-9
 - a. Ensure check request matches name and address on W-9
 - i. Some preceptors have a W-9 in their practice name

Special Notations

Entity	Entity Payment Per Student	Preceptor Payment Per Student
Adventist Health	\$350.00	\$650.00
VA/ Dr. Chaudhry	\$0	\$0

Guest Speaker Example

- a. **Payee:** enter preceptor or site name
- b. **Date/Date Needed:**
 - a. *Guest Preceptor*
Speakers: verify with Clinical Affairs Director
 - b. *Block Preceptors:*
one-week from block end date
- c. **Mailing Address:** enter Preceptor or site mailing address (should match payee address)
- d. **Amount:**
 - a. *Guest Preceptor:*
verify with Clinical Affairs Director
 - b. *Block Preceptors:*
\$1,000 per student
- e. **Purpose:** Identify type
 - a. *Guest Preceptor:*
 - i. Sub-Internship
 - ii. PRHS I, II, III, or IV
 - b. *Block:* Preceptor Payment (include Block rotation and dates)
 - c. Add FULL name of Preceptor and degree (i.e. Dr. Sam XYZ, MD)



Check Request
Business Office

Return completed form with supporting documentation to the **Business Office** or email **AP@chsu.edu**

Payee: UC Regents

Date: 7/17/2020

Date Needed: ASAP - payment due 7/24/2020

Mailing Address: C/O Karen Jones, UCSF Fresno, 155 North Fresno Street, Fresno CA 93701

Amount: \$ 500.00

Business Purpose: Sub-Internship: Shakeel Ahmad UCSF

Special Instructions:

Please Give Check To:

Mail: ☒

Expense Coding

College	Department	Account	Sub-Ledger	Amount
02 - COM	0310	73750		\$ 500.00
				\$
				\$
Total:				\$ 500.00

Requested By: Vanesha M. Reyes 7/17/2020
Date

Approved By: Deane M. [Signature] 7/17/2020
Date

Business Office Use Only:


Date Entered: _____ Posting Date: _____

☐ W-9 Received (New Vendors Only)

Updated 10/31/2018

Block Preceptor Example

- f. **Mail:** Check box
- g. **Campus code:** 02-COM
- h. **Dept code:** 0310
- i. **Account:** 73750
- j. **Amount:** enter
- k. **Digital signatures:**
 - a. Clin-Ed Coordinator
 - b. Clinical Affairs Director
- l. **Date and save document:**
CHSU.EDU>Resources>Quick
Links>CHSUDocs
SharePoint>CHSU Org>College
of Osteopathic
Medicine>Clinical affairs>
Department>Preceptor
Payments
 - a. Select appropriate folder



Check Request
Business Office

Return completed form with supporting documentation to the **Business Office** or email AP@chsu.edu

Payee: Aftab Naz dba Madera Family Medical Group

Date: 9/3/2020 Date Needed:

Mailing Address: 1111 W. 4th Street, Madera CA 93637 Amount: \$ 2,000.00


Business Purpose: Preceptor Payment (Block 1 - 8/03 - 8/30)


Special Instructions:

Please Give Check To: Mail: ☒

Expense Coding

College	Department	Account	Sub-Ledger	Amount
02 - COM	310	73750		\$ 2,000.00
				\$
				\$
Total:				\$ 2,000.00

Requested By: 

Approved By: 

9/3/2020 Date

9/3/2020 Date

Business Office Use Only:

Date Entered: _____ Posting Date: _____

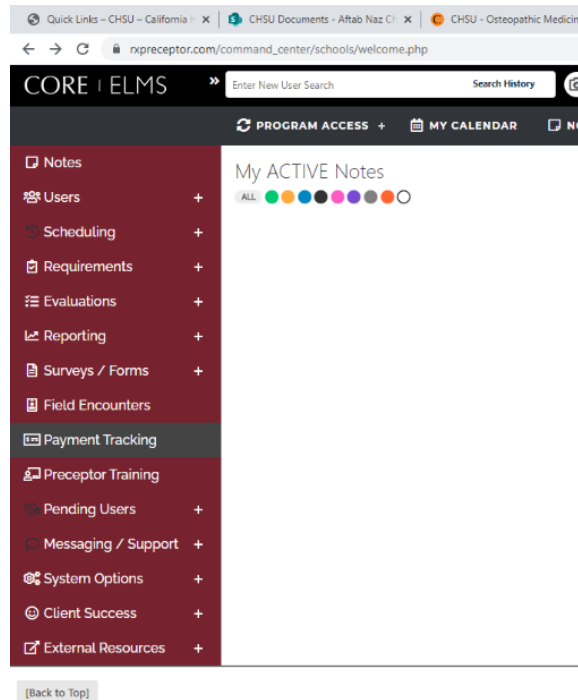
☐ W-9 Received (New Vendors Only)

Updated 10/31/2018

4. **Email Check Request to Accounts Payable:** ap@chsu.edu
 - a. CHMG: email Pam Nunes the preceptor scheduled and payment calendar
 - b. **Special Note for New Preceptor 1st payment:** Attach copies of affiliation agreement and W-9 to accounts payable email

PROCEDURE STEP: Core Payment Tracking

1. Log into CORE ELMS
2. Select: Payment Tracking



3. Select a Date Group

Payment Tracking

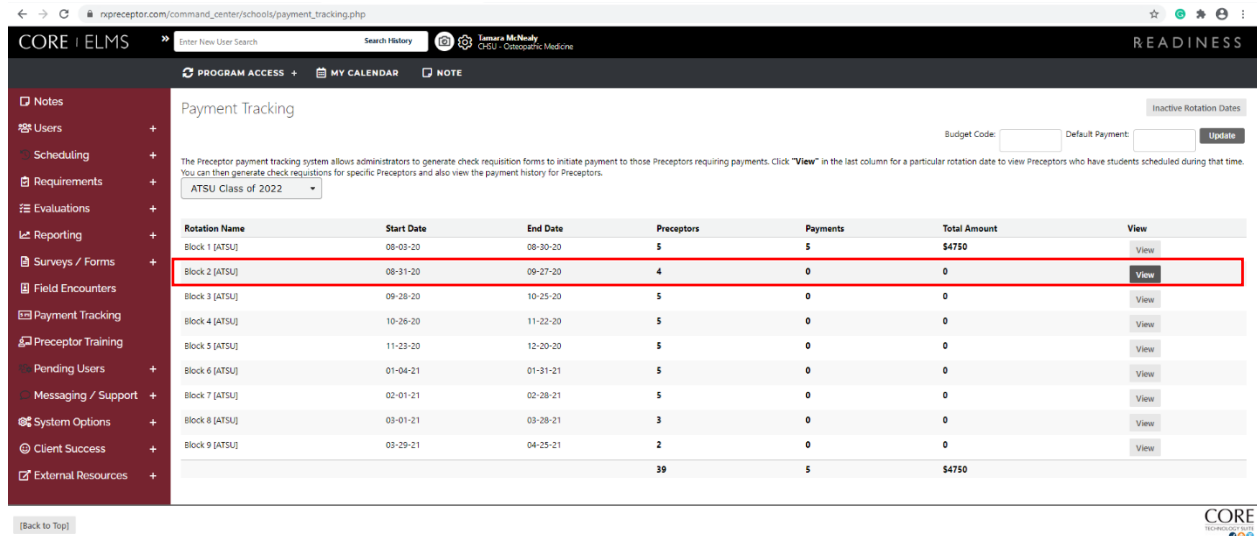
Budget Code: Default Payment:

The Preceptor payment tracking system allows administrators to generate check requisition forms to initiate payment to those Preceptors requiring payments. Click "View" in the last column for a particular rotation date to view Preceptors who have students scheduled during that time. You can then generate check requisitions for specific Preceptors and also view the payment history for Preceptors.

Select a Date Group

	Start Date	End Date	Preceptors	Payments	Total Amount	View
ATSU Class of 2021	03-23-20	04-19-20	0	0	0	View
ATSU Class of 2022	04-20-20	05-17-20	0	0	0	View
CHSU-COM Class of 2024	05-18-20	06-14-20	0	0	0	View
KCU Class of 2021	06-15-20	07-12-20	0	0	0	View
KCU Class of 2022	07-13-20	08-09-20	0	0	0	View
Block 1 [ATSU]	08-03-20	08-30-20	5	5	\$4750	View
Block 1 [KCU]	08-03-20	08-30-20	8	11	\$11000	View
4th Year (Block 6) [ATSU]	08-10-20	08-23-20	0	0	0	View
4th Year (Block 7) [ATSU]	08-24-20	09-06-20	0	0	0	View
Block 2 [ATSU]	08-31-20	09-27-20	4	0	0	View

4. Select Block rotation: Click View button for the block rotation date completed



Payment Tracking

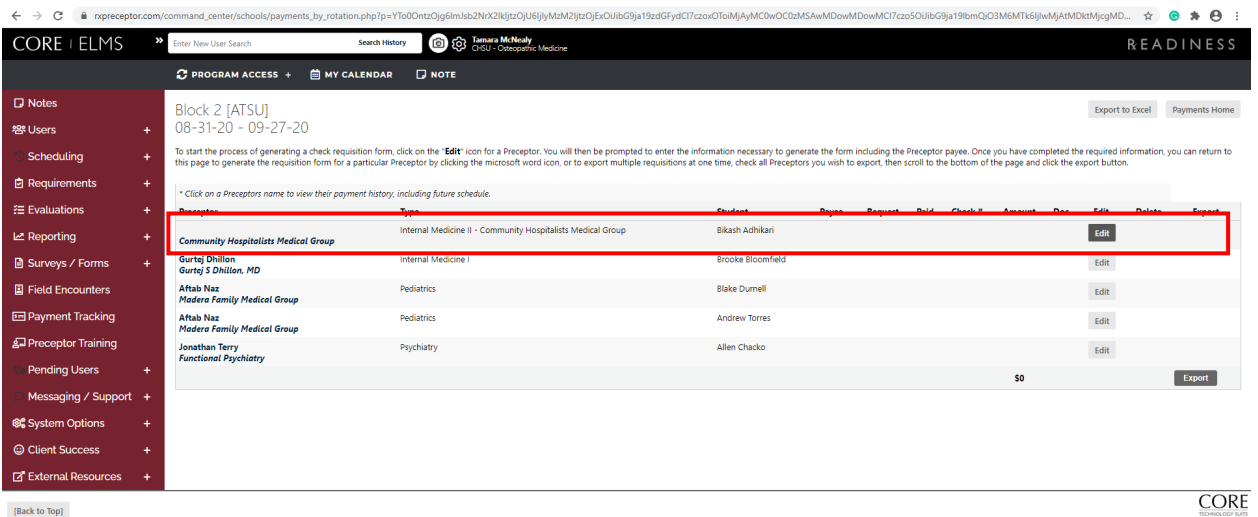
The Preceptor payment tracking system allows administrators to generate check requisition forms to initiate payment to those Preceptors requiring payments. Click "View" in the last column for a particular rotation date to view Preceptors who have students scheduled during that time. You can then generate check requisitions for specific Preceptors and also view the payment history for Preceptors.

ATSU Class of 2022

Rotation Name	Start Date	End Date	Preceptors	Payments	Total Amount	View
Block 1 [ATSU]	08-03-20	08-30-20	5	5	\$4750	View
Block 2 [ATSU]	08-31-20	09-27-20	4	0	0	View
Block 3 [ATSU]	09-28-20	10-25-20	5	0	0	View
Block 4 [ATSU]	10-26-20	11-22-20	5	0	0	View
Block 5 [ATSU]	11-23-20	12-20-20	5	0	0	View
Block 6 [ATSU]	01-04-21	01-31-21	5	0	0	View
Block 7 [ATSU]	02-01-21	02-28-21	5	0	0	View
Block 8 [ATSU]	03-01-21	03-28-21	3	0	0	View
Block 9 [ATSU]	03-29-21	04-25-21	2	0	0	View
			39	5	\$4750	

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5. Select Preceptor: Click Edit button



Block 2 [ATSU]
08-31-20 - 09-27-20

To start the process of generating a check requisition form, click on the "Edit" icon for a Preceptor. You will then be prompted to enter the information necessary to generate the form including the Preceptor payee. Once you have completed the required information, you can return to this page to generate the requisition form for a particular Preceptor by clicking the microsoft word icon, or to export multiple requisitions at one time, check all Preceptors you wish to export, then scroll to the bottom of the page and click the export button.

* Click on a Preceptors name to view their payment history, including future schedule.

Preceptor	Type	Student	Preceptor	Request	Paid	Check	Amount	Date	Edit	Delete	Export
Community Hospitalists Medical Group	Internal Medicine II - Community Hospitalists Medical Group	Bikash Adhikari							Edit		
Gurtej Dhillon Gurtej S Dhillon, MD	Internal Medicine I	Brooke Bloomfield							Edit		
Aftab Naz Madera Family Medical Group	Pediatrics	Blake Durnell							Edit		
Aftab Naz Madera Family Medical Group	Pediatrics	Andrew Torres							Edit		
Jonathan Terry Functional Psychiatry	Psychiatry	Allen Chacko							Edit		
							\$0				Export

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6. Enter information:

Check Requisition Form

The data collected in this form will be used to generate the Precceptors check requisition form. It will also be used to enter the payment information once the check has been issued. Fields marked in red are required to fully populate the check requisition form. To establish a new payee for this Preceptor, click "Add New Payee" at the bottom of the form. To change a payee, either select a new payee that already exists, or click to "Add New Payee".

*** Request Date:**

Paid Date:

For Preceptor Services Provided By: - Community Hospitalists Medical Group

For Student: Bilalash Adhikari

For Rotation Date: 08-31-20 - 09-27-20

For Rotation Type: Internal Medicine II

*** Payment Amount:** Format: (500.00)

Check #: Do not include the # sign

***Office Pick Up:** ☐ Will Pick Up ☒ Please Mail

File Attachment / Document URL

Attach New File: No file chosen

Upload file requirements **Max File Size allowed:** 20MB
Extensions allowed: doc, docx, txt, pdf, rtf, gif, jpg, jpeg, png, ppt, pptx, swf, tif, tiff, xls, xlsx, mp3, mpeg, mp4

Requisition Memo:

*** Pay to the order of:** [Add New Payee](#)
Currently this Preceptor has no payees established...

Enter Requisition Info

7. Attach New File: attach completed Check Request form

8. Enter Requestion Info: click to submit

GLOSSARY

California Health Sciences University

AACOM	American Association of Colleges of Osteopathic Medicine
ACGME	Accreditation Council for Graduate Medical Education
AHA	American Heart Association <ul style="list-style-type: none"> • BLS: Basic Life Support (Healthcare Provider) • ACLS: Advanced Cardiac Life Support • PALS: Pediatric Advanced Life Support
AOA	American Osteopathic Association
ARC	American Red Cross
CHEA	Council for Higher Education Accreditation
CHSU	California Health Sciences University
COCA	Commission on Osteopathic College Accreditation
COM	College of Osteopathic Medicine
COMAT	Distinctive subject examinations designed to assess core osteopathic medical knowledge. currently tests on eight core clinical disciplines: Emergency Medicine, Family Medicine, Internal Medicine, OB/GYN, Osteopathic Principles and Practice, Pediatrics, Psychiatry, and Surgery. 2.5-hour exam consisting of 125 questions
COMLEX Level 2 CE	COMLEX-USA Level 2-Cognitive Evaluation (C.E.) is a problem-based and symptoms-based assessment related to clinical care. Broken up into two 4-hour sessions in the same day. 400 questions, the exam covers a wide array of topics including: emergency medicine, family medicine, internal medicine, obstetrics/gynecology, osteopathic

	principles and neuromusculoskeletal medicine, pediatrics, psychiatry, surgery, and other relevant areas
COP	College of Pharmacy
D.O.	Doctor of Osteopathic Medicine
Direct Supervision of a Medical Student	Direct supervision of a medical student by a licensed provider who is available in the facility at the time the student is providing care to any patient. For a procedure, the licensed provider must be credentialed to perform the procedure and in the room with the student throughout.
M.D.	Medical Doctor
NACIQI	National Advisory Committee on Institutional Quality and Integrity
NBOME	National Board of Osteopathic Medicine Examiners
OCC	Osteopathic Core Competencies
OMM	Osteopathic Manipulative Medicine
OMS-I, II, III, IV	Osteopathic Medical Student in academic year 1, 2, 3, or 4
OPP	Osteopathic Principles and Practice
Title IV	Title IV of the Higher Education Act
USDE	United States Department of Education and the Secretary of Education
WASC	Western Association of Schools and Colleges

Clinical Ed-Department

ATSU	A.T. Still University; visiting third- and fourth-year students for clerkship
CHMG	Community Hospitalist Medical Group
CHMG Hospitalist	Contracted Internal Medicine Preceptor (DR)
Clerkship	Clinical clerkships encompass a period of medical education in which medical students train in a teaching hospital

CORE ELMS	Experiential Learning Management System
CMC	Community Medical Centers
CRMC	Community Regional Medical Center
Education Days	Third-year osteopathic medical students will be presented with didactic and small group discussion content covering clinical content, topics of the community health center movement, health systems science, and the Central Valley. The students will be presenting patient case presentations and facilitating journal clubs.
EMR	Electronic medical records
FBU	Fresno Barrios Unidos
FQHC	Federally Qualified Health Center <ul style="list-style-type: none"> • Omni and Golden Valley
GME	Graduate Medical Education
GVH	Golden Valley Hospital
Hospitalist	CRMC contracted preceptors
ID/DL	Identification/Driver's License
ILP	Individualized Learning Plan
IPE	Interprofessional Education
KCUMB (KCU)	Kanas City University Medicine and Biosciences; visiting third- and fourth-year students for clerkship
LIGS	Letters in Good Standing- A letter of good standing is used to verify the character and academic status of a student
MCH	Madera Community Hospital
NP	Nurse Practitioner
OMM	Osteopathic Manipulative Medicine

Third-year osteopathic medical students will be provided the opportunity to complete training in osteopathic manipulation medicine; OMM day is held the last day of clerkship following COMAT exams.

PGY-1	Post Graduate Year One; residency or intern rotations
Preceptor	The Preceptor guides the student's clinical learning experience, facilitates student autonomy, and acts as a role model.
PRHS I, II, III, IV	Physician Role in Health Science Courses 1, 2, 3, 4
QuantIFERON Gold test	(QFT) is a simple blood test that aids in the detection of Mycobacterium tuberculosis, the bacteria which causes tuberculosis (T.B.)
SLO	Service-Learning Opportunity
Student Credentialing	Verification documents required for clinical rotation
SUB-I	Sub-internship <ul style="list-style-type: none"> • 2022 Visiting students • Three residency rotations (in hospital)
VSAS	Visiting Students Application System
VSLO	Visiting Students Learning Opportunities
WILP	Wellness Individualized Learning Plan

