



Stony Brook Medicine Administrative Policy and Procedures

Subject: MS0014 Observers to Stony Brook University Hospital and SBM Clinical Sites	Published Date: 01/17/2024
Medical Staff	Next Review Date: 01/17/2027
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Responsible Department/Division/Committee:

Medical Staff Office (MSO), Renaissance School of Medicine (RSOM), Graduate Medical Education (GME)

Policy:

Stony Brook Medicine prides itself on the relationships it has with educational institutions to provide meaningful work experiences in healthcare for its students and for others who are interested in learning about career opportunities and pathways at Stony Brook Medicine. To ensure a positive learning experience and full compliance with regulatory requirements, specific processes are followed.

Definitions:

Observers – Observers are physicians, dentists, residents, fellows and selected students who have been accepted as visitors by an academic program within the Renaissance School of Medicine (RSOM) for the purpose of observing patient care or clinical activity.

Brief Observers – Observers with a restricted time allotment of two (2) work days or less (see additional details below). Brief Observers include, but are not limited to, prospective faculty or residency/fellowship candidates (medical/graduate students), clinical experts who provide mentoring or training to SBUH faculty/staff members in the clinical setting, or visiting physicians/advanced practitioners receiving training from SBUH faculty.

NOTE: The Brief Observer process is **not** to be used for family, friends, or students seeking to observe clinical activities for a short period of time.

Procedures:

Observers have no patient care role at Stony Brook University Hospital (SBUH) or any of the Stony Brook Medicine (SBM) clinical sites. They are the guests of the respective SBM Clinical Chief and are under the supervision of an SBM attending physician at all times.

1. The Observer Program is managed and overseen by the RSOM and the MSO. The following is ensured.
 - a. The Clinical Department Chair assigns a physician to serve as the observer's preceptor. The preceptor must supervise the student and ensure the student's actions and behavior are in compliance with all policies, work rules, code of conduct, and SBUH iCare core values.
 - b. The observer experience must be **no less** than 10 work days in duration. The days are not required to be consecutive, allowing observers to complete their experience over time. However, the experience must be completed within 90 days.
 - c. Observers must be individually approved by the RSOM/MSO, or they may be part of an approved program sponsored by the RSOM.
 - i. For programs that are approved and sponsored by the RSOM, prioritization will be granted to:
 1. Programs designed to introduce medical careers to students or physicians from disadvantaged backgrounds;
 2. Programs designed to afford opportunities to Stony Brook University students.
 - d. Approved by the Dean, RSOM, or the Dean's delegate as engaged in a shadowing experience that advances the aims and mission of the RSOM.
 - i. Such programs must have formalized goals and objectives for the observers involved.
 - ii. Shortened observer experiences without clear educational goals and objectives are not permitted unless under the qualifications of the Brief Observer track (see below).
 - iii. Preferential selection will be applied for existing Stony Brook University undergraduate and graduate students over external candidates.
 - e. In compliance with any and all Stony Brook University Hospital requirements for hospital clearance (as defined below) for access to patient care areas (when applicable). This applies to any area that students may go to within the Stony Brook Medicine clinical sites, whether they are in a hospital space or in an ambulatory, non-hospital space. Any costs associated with meeting these

requirements will be the responsibility of the department of the faculty sponsoring the program.

- i. Observers may not be allowed to access high-risk locations within Stony Brook University Hospital unless granted an exemption by the chair or chief of service of the hosting department and provided specialized training (pertaining to infection control and/or aseptic environment in restricted areas) as deemed necessary by the individual granting the exemption.

The following areas are designated as high-risk:

1. Operating Rooms
 2. Procedural Rooms
 3. Patient Isolation Rooms
 4. Central Sterile
 5. Pathology Laboratories
2. Records of the experience are maintained through the Dean's office in the area of Academic Affairs, or other area as deemed necessary by the Dean. While on site, the observer is responsible for retaining a copy of the Observer Form as evidence of permission to observe.
 3. Those participating do so purely on a voluntary basis. No salary shall be offered, nor tuition be charged to the student observers.
 4. Those participating may not perform any tasks, duties, or actual work.
 5. The RSOM is responsible for the background and clearance processes described above and for obtaining visitor badges for such observers.
 6. Any observers who apply and are accepted by the academic department must provide:
 - a. Evidence of their identity
 - b. Completion of their respective degrees and/or training
 - c. Health status assessment, including a current PPD and laboratory documentation of titers. The assessment and laboratory report must be in English. The physical form must be reviewed and the observer cleared to observe by Employee Health.
 - d. Any other requirements needed to comply with DOH 405 regulations or that fulfill the requirements of the Medical Staff or Resident Staff at SBUH.
 7. Observers who are residents or fellows will be processed by the Graduate Medical Education (GME) office. Attending physicians will be processed by the Medical Staff Office (MSO).
 8. Departments that wish to sponsor an observer will complete and submit the following documents to either the GME office or MSO dependent upon the current status of the observer:
 - a. All items listed in #6 above.

- b. Completed and signed [Observer Agreement](#) and [Observer Form](#)
 - c. Verified positive photo identification
 - d. Primary source verification of completion of respective degrees and/or training, if applicable.
 - e. An explanation as to why the practitioner is observing.
9. Once all items are submitted to the respective office, the documentation will be submitted to the Chief Medical Officer for endorsement.
10. Once approved by the Chief Medical Officer, the observer's information will be input into the People Soft database by either GME office or MSO. Badge information will clearly state, OBSERVER.
11. Paperwork will be maintained by either the GME office or MSO.
12. Observers:
- a. Do not perform any healthcare role whatsoever, and are explicitly forbidden from participating in patient examinations, procedures, clinical decision making, and do not contribute to patient care documentation.
 - b. Will not provide medical care to patients, which includes but is not limited to, performing the following functions: taking a medical history, performing a physical examination, diagnosing and/or treating a patient's condition, prescribing and administering drugs, writing notes or orders in the patient's medical record, performing and/or assisting in a procedure, billing for services rendered.
 - c. Must be accompanied by a SBUH attending physician when observing patient care activities.
 - d. Have no independent access to patients or to patient records (electronic or paper copy) or other protected health information.
 - e. Must wear a SBUH ID badge labeled Observer and this badge must be returned to the sponsoring department at the completion of the observership.
 - f. Permission must be obtained from any patient whose clinical encounter or procedure will be attended by an academic observer.
13. **Brief Observers:** Brief Observers are those visitors/guests who meet the definition of observer (as defined above) but are expected to visit SBUH or any SBM clinical sites for a period of time less than or equal to two work days. The following applies:
- a. Brief observers must be under the direct supervision of an SBM faculty/preceptor or a delegate of the clinical department at all times.
 - b. Brief observers are required to wear a temporary visitor pass, issued by SBUH lobby staff for other visitors, vendors, and guests.

- c. The preceptor is responsible to ensure the actions and behavior of the brief observer are in compliance with all relevant SBUH policies, work rules, code of conduct, and SBUH iCare core values.
- d. The preceptor, clinical department, or respective academic training program is required to keep a log of all brief observers visiting the institution to include all dates/times of specific visits, and also attest to the direct supervision of such guests.
- e. Brief observers must provide the following:
 - i. Evidence of their identity
 - ii. Completed and signed [Observer Agreement](#) and [Observer Form](#)

Forms: (Ctrl-Click form name to view)

[Observer Agreement](#)

[Observer Form](#)

Policy Cross Reference: (Ctrl-Click policy name to view)

[LD0086 Confidentiality Agreement with Tour Participants, Agents, Media and Meeting Guests](#)

Relevant Standards/Codes/Rules/Regulations/Statutes:

None

References and Resources:

None