Clinical Supervision of Medical Students: Promoting Patient and Student Safety

Faculty Guidelines

Boston University School of Medicine

This document and additional faculty resources can be found on our website at:

http://www.bumc.bu.edu/busm/education/academic-affairs/faculty-resources/
Medicine 1

Department of Medicine
MS 310
2019-2020

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Clerkship Coordinator: Yulianna Santos
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## INSTITUTIONAL LEARNING OBJECTIVE

### B - Behaves in a caring, compassionate and sensitive manner toward patients and colleagues of all cultures and backgrounds.

#### (Interpersonal and Professionalism)

<table>
<thead>
<tr>
<th>MEDICAL EDUCATION PROGRAM OBJECTIVE</th>
</tr>
</thead>
<tbody>
<tr>
<td>B.1 - Apply principles of social-behavioral sciences to provision of patient care; including assessment of the impact of psychosocial and cultural influences on health, disease, care-seeking, care compliance, and barriers to and attitudes toward care. (2.5)</td>
</tr>
<tr>
<td>B.2 - Demonstrate insight and understanding about emotions that allow one to develop and manage interpersonal interactions. (4.7)</td>
</tr>
<tr>
<td>B.3 - Demonstrate compassion, integrity, and respect for others. (5.1)</td>
</tr>
<tr>
<td>B.4 - Demonstrate sensitivity and responsiveness to a diverse patient population, including but not limited to diversity in gender, age, culture, race, religion, disabilities, and sexual orientation. (5.5)</td>
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### U - Uses the science of normal and abnormal states of health to prevent disease, to recognize and diagnose illness and to provide and appropriate level of care. (Medical Knowledge and Patient Care)

<table>
<thead>
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<tbody>
<tr>
<td>U.1 - Perform all medical, diagnostic, and surgical procedures considered essential for the area of practice. (1.1)</td>
</tr>
<tr>
<td>U.2 - Gather essential and accurate information about patients and their conditions through history-taking, physical examination, and the use of laboratory data, imaging and other tests. (1.2p)</td>
</tr>
<tr>
<td>U.3 - Interpret laboratory data, imaging studies, and other tests required for the area of practice. (1.4)</td>
</tr>
<tr>
<td>U.4 - Make informed decisions about diagnostic and therapeutic interventions based on patient information and preferences, up-to-date scientific evidence and clinical judgement. (1.5)</td>
</tr>
<tr>
<td>U.5 - Develop and carry out patient management plans. (1.6)</td>
</tr>
<tr>
<td>U.6 - Provide health care services to patients, families, and communities aimed at preventing health problems or maintaining health. (1.9)</td>
</tr>
<tr>
<td>U.7 - Demonstrate an investigatory and analytic approach to clinical situations. (2.1)</td>
</tr>
<tr>
<td>U.8 - Apply established and emerging bio-physical scientific principles fundamental to health care for patients and populations. (2.2)</td>
</tr>
<tr>
<td>U.9 - Apply established and emerging principles of clinical sciences to health care for patients and populations. (2.3)</td>
</tr>
<tr>
<td>U.10 Recognizes that ambiguity is a part of clinical health care and respond by utilizing appropriate resources in dealing with uncertainty. (8.8)</td>
</tr>
</tbody>
</table>

### C - Communicates with colleagues and patients to ensure effective interdisciplinary medical care (Interpersonal and Communication Skills; Patient Care)

<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>C.1 - Gather essential and accurate information about patients and their conditions through history-taking, physical examination, and the use of laboratory data, imaging and other tests. (1.2h)</td>
</tr>
<tr>
<td>C.2 - Counsel and educate patients and their families to empower them to participate in their care and enable shared decision making. (1.7)</td>
</tr>
<tr>
<td>C.3 - Participate in the education of patients, families, students, trainees, peers and other health professionals. (3.8)</td>
</tr>
<tr>
<td>C.4 - Communicate effectively with patients, families, and the public, as appropriate, across a broad range of socioeconomic and cultural backgrounds. (4.1)</td>
</tr>
<tr>
<td>C.5 - Communicate effectively with colleagues within one’s profession or specialty, other health professionals, and health related agencies (4.2, see also 7.3)</td>
</tr>
<tr>
<td>C.6 - Maintain comprehensive, timely, and legible medical records. (4.5)</td>
</tr>
<tr>
<td>C.7 - Demonstrate sensitivity, honesty, and compassion in difficult conversations, including those about death, end of life, adverse events, bad news, disclosure of errors, and other sensitive topics. (4.6)</td>
</tr>
<tr>
<td>C.8 - Communicate with other health professionals in a responsive and responsible manner that supports the maintenance of health and the treatment of disease in individual patients and populations. (7.3)</td>
</tr>
<tr>
<td>INSTITUTIONAL LEARNING OBJECTIVE</td>
</tr>
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<td>----------------------------------</td>
</tr>
</tbody>
</table>
| A - Acts in accordance with highest ethical standards of medical practice (Professionalism) | A.1 - Demonstrate responsiveness to patient needs that supersedes self-interest. (5.2)  
A.2 - Demonstrate respect for patient privacy and autonomy. (5.3)  
A.3 - Demonstrate accountability to patients, society, and the profession. (5.4)  
A.4 - Demonstrate a commitment to ethical principles pertaining to provision or withholding of care, confidentiality, informed consent, and business practices, including compliance with relevant laws, policies, and regulations. (5.6)  
A.5 - Work with other health professionals to establish and maintain a climate of mutual respect, dignity, diversity, ethical integrity, and trust. (7.1)  
A.6 - Demonstrate trustworthiness that makes colleagues feel secure when one is responsible for the care of patients. (8.5) |
| R - Reviews and critically appraises biomedical literature and evidence for the purpose of ongoing improvement of the practice of medicine. (Practice-Based Learning and Improvement and Medical Knowledge) | R.1 - Apply principles of epidemiological sciences to the identification of health problems, risk factors, treatment strategies, resources, and disease prevention/health promotion efforts for patients and populations. (2.4)  
R.2 - Locate, appraise, and assimilate evidence from scientific studies related to patients' health problems. (3.6)  
R.3 - Continually identify, analyze, and implement new knowledge, guidelines, standards, technologies, products, or services that have been demonstrated to improve outcomes. (3.10) |
| E - Exhibits commitment and aptitude for life-long learning and continuing improvement (Practice-based Learning) | E.1 - Identify strengths, deficiencies, and limits in one's knowledge and expertise. (3.1)  
E.2 - Set learning and improvement goals. (3.2)  
E.3 - Identify and perform learning activities that address one's gaps in knowledge, skills, and/or attitudes. (3.3)  
E.4 - Incorporate feedback into daily practice. (3.5)  
E.5 - Obtain and utilize information about individual patients, populations of patients, or communities from which patients are drawn to improve care. (3.9)  
E.6 - Develop the ability to use self-awareness of knowledge, skills, and emotional limitations to engage in appropriate help-seeking behaviors. (8.1)  
E.7 - Manage conflict between personal and professional responsibilities. (8.3) |
| S - Supports optimal patient care through identifying and using resources of the health care system. (Systems-Based Practice and Patient Care) | S.1 - Provide appropriate referral of patients including ensuring continuity of care throughout transitions between providers or settings, and following up on patient progress and outcomes. (1.8)  
S.2 - Systematically analyze practice using quality-improvement methods and implement changes with the goal of practice improvement. (3.4)  
S.3 - Use information technology to optimize learning. (3.7)  
S.4 - Work effectively with others as a member or leader of a health care team or other professional group. (4.3, see also 7.4)  
S.5 - Work effectively in various health care delivery settings and systems relevant to one's clinical specialty. (6.1)  
S.6 - Coordinate patient care within the health care system relevant to one's clinical specialty. (6.2)  
S.7 - Incorporate considerations of cost awareness and risk-benefit analysis in patient and/or population-based care. (6.3)  
S.8 - Advocate for quality patient care and optimal patient care systems. (6.4)  
S.9 - Use the knowledge of one’s own role and the roles of other health professionals to appropriately assess and address the health care needs of the patients and populations served. (7.2)  
S.10 - Participate in different team roles to establish, develop, and continuously enhance interprofessional teams to provide patient- and population-centered care that is safe, timely, efficient, effective, and equitable. (7.4) |
**BUSM Clerkship Learning Objectives**

During the third-year clerkships, students will

- Demonstrate use of patient-centered interviewing and communication techniques (U.2)
- Take a clinical history that demonstrates both organization and clinical reasoning (U.7)
- Perform accurate and relevant physical exam techniques (U.2)
- Demonstrate an ability to synthesize clinical information and generate a differential diagnosis, assessment and plan (U.3, R2, U.5)
- Demonstrate a compassionate and patient-sensitive approach to history taking and physical examinations (B.3)
- Communicate well organized, accurate and synthesized oral presentations (C.1)
- Counsel and educate patients and families (C.3)
- Demonstrate timely, comprehensive and organized documentation (C.6)
- Demonstrate a fund of knowledge in the clinical discipline and apply this to patient care (U.4)
- Demonstrate an awareness of one’s own learning needs and work to address these gaps (E.1, E.3)
- Show respect and empathy for others (B.3)
- Demonstrate accountability to the responsibilities of the student’s role and expectations of a clinical clerk (S.4)
- Communicates effectively with the interprofessional team (S.9)

**Clerkship Learning Objectives**  
*(Linked to Medical Education Program Objectives in parentheses)*

**By the end of the clerkship, each student will be able to**

1. **Demonstrate professional and humanistic behavior in clinical and clerkship related responsibilities:**
   - Be present and punctual
   - Proactively clarify your role and responsibilities, and reliably respond to patient care needs
   - Appropriately identify your position as “Student” or “Student Doctor”
   - Maintain confidentiality
   - Be forthright and accept responsibility for errors
   - Ask for help appropriately
   - Build a therapeutic relationship through a **respectful, empathic** approach that gains the **trust** of the patient
     - Dress and behave in a way that promotes patient and team comfort, trust and confidence in you
   - Demonstrate that the interests of the patient guide your behavior by:
     - Working to meet the patient’s needs – at times this means accepting personal inconvenience
     - Advocating for patient’s needs – e.g. getting a test, consult or follow-up appointment  
     *(B.3, A.1, A.2)*

2. Develop productive, collaborative working relationships with other members of the health care **team** and system, effectively contribute to the provision of quality patient care, and work toward the **improvement of the systems of care.** *(S.4)*
III. Use proper technique to perform an accurate, appropriately detailed and organized **history and physical examination** in an efficient and sensitive manner, with a special emphasis on the intermediate and advanced physical diagnosis skills involved in volume assessment, the cardiovascular exam and the chest/pulmonary exam. (C.1)

IV. Communicate clinical information accurately and demonstrate your understanding of the patient’s problems, through concise, convincing, well-organized **patient presentations, admission write-ups, progress notes, and handoffs** that are appropriately focused for the audience, purpose and time available for the communication. (C.4, C.5, C.8)

V. **Identify and prioritize your patients’ problems, formulate an appropriate differential diagnosis** and outline an approach to diagnosis and management that is supported by clinical data and sound reasoning. (U.4, U.5)

VI. **Educate patients** about their conditions and partner with them to develop and implement a treatment plan. (C.2, C.4)

VII. Perform the designated **procedures** with appropriate technical proficiency while demonstrating attention to the patient’s needs and concerns, and describing a clear understanding of benefits/risks, indications/contraindications. (U.1)

VIII. Demonstrate a core foundation of **knowledge** (scientific, ethical, socio-cultural) guided by the course objectives that is necessary both to provide high quality patient care and to understand advances in medicine. (U.9)

IX. **Identify and address your learning needs** (by asking questions and critically incorporating information from appropriate resources into the decision-making process) and effectively share this information with colleagues. (R.3, E.1, E.3, E.4)

X. Solicit and probe for useful **feedback**, and respond with **improved performance**. (E.2, E.4)
Contact Information

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Third Year Student
The 3rd year student:
- Learns through meaningful involvement in patient care and learning with graduated decision-making responsibility
- Is available to help the team but “Learning comes first”
- Is a proactive, self-directed learner

Learns through meaningful involvement in patient care and learning/teaching with graduated decision-making responsibility.
- Sees patients independently
- Pre-rounds and initiates discussion with assigned patients on work rounds
- Formally presents assigned patients each day on work rounds
- Enters patient orders under the supervision of physicians
- Follows-up on labs, imaging, consults
- Updates intern, team and patient (CHECK-IN with team members, see above) as new information emerges
- Speaks with consultants
- Provides initial write-up & daily progress notes
- Admits ≥ 3 new patients per week (ideally new admissions and not transfers from ICU), of which at least 1 patient/week is “truly new” (i.e., admitted from the ED or office/clinic; transfer patients and patients initially admitted by night float do not count as “truly new”)
- Provides brief, targeted topic presentations to the team on a regular (at least weekly) basis
- Learns from own patients first but also from all patients on the team
- Participates in discharge planning on patients you directly follow but do not do discharge summaries!

The 3rd year student is available to help the team but learning comes first.
- Learning from direct patient care is complemented by:
  - Attending conferences and small group learning sessions
  - Observing procedures
  - Reading (at night and during slow periods on some days).

The 3rd year student is a proactive, self-directed learner who:
- Elicits and clarifies expectations from your interns, resident, and attendings
- Addresses questions, concerns, confusion with the team or with your CD ASAP
- Identifies your learning needs and acts upon them
- Solicits feedback from your teachers
- Contacts your Clerkship Director with questions, comments or concerns early
- Adapts to team transitions and realities

Adapted from the Family Medicine’s Preceptor Manual, written by Miriam Hoffman, MD and Molly Osher-Cohen, MD
Updated 4/2018, 5/2019, Medical Education Office
REQUIRED DIAGNOSES

Each student is expected to “see” > 15 patients where you serve as the primary student actively caring for the patient, writing notes… (under the guidance of faculty and house staff). Included among the patients you must see are patients with each of the following “Big 10” active problems:

- Fever
- Low Blood Pressure
- The hospitalized patient with best pain
- Shortness of breath
- Lab abnormalities (glucose, acid-base, creatinine, sodium, potassium, calcium, hemoglobin)
- Palpitations
- Extremity Pain/Swelling
- The hospitalized patient with chronic kidney disease
- The hospitalized patient with congestive heart failure
- The hospitalized patient with COPD/emphysema

See “Patient Encounters Log” section for details on documenting required patient encounters.

Strongly Recommended Experiences

In addition to the requirements described above, it is strongly recommended that you care for patients with the attributes or conditions described below, and address the recommendations regarding patient education/counseling, prevention, systems and patient safety and procedures.

Socio-demographics
- Elderly patient- > 75 years of age
- A patient who does not speak English
- A patient with limited access to care
- A patient from a culture not your own

Patient Education/Counseling – Perform the following patient education/counseling interactions as clinically indicated on patients you follow.
  - Provide discharge instructions
  - Promote behavioral change (e.g. tobacco, alcohol, other substance use, diet, weight loss, exercise)
  - Facilitate medication adherence

End of Life and Advance Directives Discussions. Join your attending, resident or the Palliative Care Service to observe and participate in these crucial and powerful discussions with the patient and family in which, through partnership, decisions are made that integrate patient prognosis with patient values, priorities and wishes, to guide care in very ill patients who are near the end of their lives.

Prevention (primary, secondary or tertiary)/health promotion as a major focus of the interaction. Address an issue of prevention with the patients you follow. Prevention interventions may overlap with the patient education/counseling described above.

Adapted from the Family Medicine’s Preceptor Manual, written by Miriam Hoffman, MD and Molly Osher-Cohen, MD
Updated 4/2018, 5/2019, Medical Education Office
Systems and Patient Safety

- Identify instances where systems problems or strengths may have impacted on the quality of care your patients received
- Propose ways to improve the Microsystems of care with which you interact
- Educate your patient on his major condition and the key medications you are asking him to take

Procedures you may observe:

- **Observe the following procedures** listed below, **describe the experience from the patient’s perspective**, and **interpret and apply the results** to the patient.

  - Thoracentesis
  - Paracentesis
  - Lumbar puncture
  - Cardiac stress test
  - Echocardiogram
  - Cardiac catheterization
  - GI endoscopy
  - Bronchoscopy

- In addition, for each of the procedures listed above you should aim to **describe**:

  - The information it can provide
  - Benefits and risks
  - Indications/Contraindications
  - Potential complications and how to reduce the risk of the complications

**OTHER CLERKSHIP REQUIREMENTS**

1. **FOCUS Cards and Internal Medicine Structured Observations of Clinical Skills (SOCS):** These exercises are designed to assist the student in obtaining ongoing, real-time feedback after being directly observed performing a variety of skills (interviewing a patient, performing physical exam skills, delivering an oral presentation, documenting a clinical encounter). These exercises will be student-initiated (students are encouraged to provide observers the cards PRIOR to performing the skills) and completed on the wards by residents and attendings.

   FOCUS cards will be uploaded by students into eValue and sent to the BUSM Office of Medical Education. **2 of these cards should be completed and upload by the time of the mid-clerkship feedback sessions.**

   The Internal Medicine SOCS cards will be also reviewed at mid-clerkship feedback and turned in at the end of the rotation as part of the passport.

   Both the formative assessment exercises of FOCUS cards and Medicine SOCS cards are not included in the calculations of students’ final grades.

   Students should:

   - Complete, sign (along with your observer) and upload to eValue at least 8 FOCUS Forms
     - Interview and Data Gathering (2)
2. Formal Evaluation of the Write-Up and Presentation

- A list of students and their assigned Site Director will be disseminated in advance by the clerkship coordinator, and the student will be contacted to schedule the appointment.
- This evaluation will take place during the 5th-8th week of the clerkship, unless extenuating circumstances do not allow.
- The student will hand in/email the write-up to the CD evaluator 3 or more days in advance of the meeting with that CD.
- The formal but targeted oral presentation (simulating what would ideally occur on work rounds) should be done for a newly admitted inpatient who is different from the person described in the write-up.
- The write-up and oral presentation will each be scored from 0-100 (based on a grading rubric), and the average of the 2 scores make up the contribution from this component of the grading process toward the final grade. The grading rubrics for the oral presentation and write up should be emailed to the clerkship coordinator.
- Failure to meet the expectations outlined above will result in a reduction in the student’s score.

3. Small group sessions with the Site Director. These sessions focus on refining core skills and building advanced skills in:
   - The write-up and oral patient presentation
   - The interview and physical exam- with a particular focus on the CV exam, Chest/Pulmonary Exam, and Volume Assessment
   - Clinical reasoning
   - Integrating the medical literature into patient care
   - Promoting reflection and professional identity development, reviewing feedback with students
GOALS OF THE CLINICAL CLERKSHIP
During the clinical clerkships at BUSM we aim to create a learning climate where students have the opportunity to learn high quality clinical skills by:
· Creating a culture that challenges and supports the students
· Providing opportunities for meaningful involvement in patient care with appropriate supervision
· Role modeling by exemplary physicians
· Coaching students by setting clear expectations, providing frequent observations of core clinical skills, asking questions to assess knowledge and reasoning, explicitly modeling and providing timely, specific feedback

CLERKSHIP STRUCTURE
Each clerkship is run by a clerkship director. Each clerkship clinical site is run by a clerkship site director who ensures that students are appropriately supervised. In addition, clerkships usually have multiple clinical faculty that have varying degrees of exposure to the student.

OVERALL RESPONSIBILITIES

Clerkship Director/Assistant Clerkship Director
1. Oversee the design, implementation, and administration of the curriculum for the clerkship
2. Create and maintain an appropriate learning environment, modeling respectful and professional behaviors for and toward students
3. Ensure student and faculty access to appropriate resources for medical student education
4. Orient students to the clerkship, including defining the levels of student responsibility necessary for required diagnoses and procedures
5. Oversee teaching methods (e.g. lectures, small groups, workshops, clinical skills sessions, and distance learning)
6. Develop faculty involved in the clerkship
7. Evaluate and grade students
   a. Develop and monitor assessment materials
   b. Use required methods for evaluation and grading
   c. Assure mid-clerkship meetings and discussion with students
   d. Ensure students are provided with feedback on their performance
   e. Submit final evaluations for students via E*Value
8. Evaluate faculty and programs via peer review and reports from the Office of Medical Education and national reports
9. Support each student’s academic success and professional growth and development, including working with students experiencing difficulties
10. Participate in the BUSM clerkship EQI and peer review processes
11. Ensure LCME accreditation preparation and adherence
12. Adhere to the AAMC-developed guidelines regarding Teacher-Learner Expectations

Clerkship Coordinator
1. Support the clerkship director in the responsibilities provided above
2. Create and maintain an appropriate learning environment, modeling respectful and professional behaviors for and toward students

Adapted from the Family Medicine’s Preceptor Manual, written by Miriam Hoffman, MD and Molly Osher-Cohen, MD
Updated 4/2018, 5/2019, Medical Education Office
3. Maintain student rosters and clinical schedules
4. Coordinate orientations and didactic sessions
5. Liaise with site directors and administrators to coordinate student experiences across all sites
6. Verify completion of clerkship midpoint and final evaluations for each student
7. Monitor students’ reported work hours and report any work hours violations to the clerkship director
8. Coordinate and proctor clerkship exams

**Clerkship Site Director**
1. Create and maintain an appropriate learning environment, modeling respectful and professional behaviors for and toward students
2. Orients students to the clinical site
3. Sets student expectations for clinical encounters and discusses student role and responsibilities
4. Supervises students by observing history taking, physical exam skills and clerkship specific required observations.
5. Ensures formative feedback in an appropriate and timely fashion
6. Delegates increasing levels of responsibility
7. Meets with the student for the Mid-clerkship review
8. Meets with the student for the final exit meeting
9. Recognize students who have academic or professional difficulties and communicate this to clerkship leadership
10. Collects feedback and evaluation data from all physicians who work with the student
11. Evaluates students fairly, objectively and consistently following medical school and department rubrics and guidelines
12. Ensure student and faculty access to appropriate resources for medical student education
13. Adhere to the AAMC-developed guidelines regarding Teacher-Learner Expectations

**Primary Clinical Faculty/Residents**
1. Set and clearly communicate expectations to students
2. Supervise students by observing history taking and physical exam skills, and document it on the FOCUS (Feedback based on Observation of Clinical Student) Form
3. Delegate increasing levels of responsibility to the student within clerkship expectations
4. Maintain appropriate levels of supervision for students at site.
5. Create and maintain an appropriate learning environment, modeling respectful and professional behaviors for and toward students
6. Recognize student learning or professional difficulties and communicate to clerkship director directly in real time in person or via email or phone
7. Give students appropriate and timely formative feedback
8. Assess students objectively using the CSEF form
9. Adhere to the AAMC-developed guidelines regarding Teacher-Learner Expectations

**ORIENTATION OF THE STUDENT TO THE CLINICAL SETTING**
This sets the tone for the rest of the experience and has a direct effect on the success of the rotation for both student and preceptor. It can also reduce student anxiety. You should:

- Orient the student to the clinical setting, the staff, and team at your site
- Review workflow
Setting Expectations for the Student

It is important to be clear regarding your expectations for the student. On the first day, describe the expectations around their role, presentations, documentation, and participation. Consider reviewing the assessment form and the specific expectations described. A tool to help set expectations with the student is the One Minute Learner, which can be found at:

Supervising the Student

Initially, the primary clinical faculty members should designate time to observe the student performing: history taking, focused physical exam, clinical problem-solving and interaction with patients and patient education. Once the supervisor establishes the student’s level of confidence and competency, the student should be delegated increasing levels of responsibility in patient care, as appropriate. Although students may initiate a particular patient encounter on their own and without direct supervision, the faculty must at some point review the encounter with the student and inform the patient in-person that the student’s assessment and management plan has been reviewed and approved by the faculty. The faculty is ultimately responsible for the evaluation, treatment, management, and documentation of patient care.

Under no circumstances should the following occur:

- Patient leaves the office/hospital with never having had a direct face-to-face encounter with clinical faculty.
- Primary faculty gives “prior approval” for student to perform intervention (order labs, prescribe meds) without satisfactory review.
- Patient leaves office/hospital without being informed that assessment/management plan has been directly reviewed and approved by the faculty.
- Learning in which a student is expected to perform an intervention or encounter without the prerequisite training and/or adequate supervision.
- Student note provides the only record of the visit. Although all faculty see all patients, faculty must document that they were actually the person responsible for seeing and examining the patient.

Federal Guidelines for Documentation

CMS Guidelines from February 2, 2018, state:

- “The Centers for Medicare & Medicaid Services (CMS) is revising the Medicare Claims Processing Manual, Chapter 12, Section 100.1.1, to update policy on Evaluation and Management (E/M) documentation to allow the teaching physician to verify in the medical record any student documentation of components of E/M services, rather than re-documenting the work. Students may...
document services in the medical record. However, the teaching physician must verify in the medical record all student documentation or findings, including history, physical exam and/or medical decision making. The teaching physician must personally perform (or re-perform) the physical exam and medical decision making activities of the E/M service being billed, but may verify any student documentation of them in the medical record, rather than re-documenting this work.”

EMR Documentation

- Students are allowed and encouraged to write complete notes in patient electronic charts as designated by the site and the site’s documentation policy.

SUPERVISION AND DELEGATING INCREASING LEVELS OF RESPONSIBILITY

It is expected that the level of student responsibility and supervision will be commensurate with student’s competency and level of confidence. When the student arrives in your practice, you may wish to have them observe you or the resident for the first session. Thereafter, they should begin to see patients on their own. In the outpatient setting, the student should initially perform 4-5 focused visits per day in the first week, increasing to 6-12 thereafter. In the inpatient setting, the student should initially follow 1-2 patients and increased to 3-4 thereafter. When a student feels that he or she is being asked to perform beyond his or her level of confidence or competency, it is the responsibility of the student to promptly inform the preceptor. It is then the preceptor’s responsibility to constructively address the student’s concerns and appropriately restructure the teaching encounter to address the student’s learning needs.

STUDENT ASSESSMENT

BUSM CLINICAL STUDENT EVALUATION FORM (CSEF): BUSM utilizes the same clinical evaluation form for all clinical rotations. It is a behaviorally based evaluation tool. This means that you will grade your clerk based on his or her knowledge/skills/attitudes, rather than how he or she compares to other students.

For example, under “Differential Diagnosis Skills”:

There is a target behavior listed. Following that are the four behavioral anchors. The highest level is the box to the far right, and the lowest to the far left. Your job is to check the box with the behaviors that the student is consistently performing.

For more detail, please refer to CSEF form.

FEEDBACK

Feedback is vital for student learning and growth and should be given regularly. Feedback during a clerkship should be given multiple times which include: real-time feedback during patient care, recap feedback at the end of the session/day and summative feedback at the mid and end of the rotation. The FOCuS (Feedback based on Observation of Clinical Student) forms required for each clerkship provide
formative assessment through direct observation of CSEF behaviors. FOCUS forms required for that clerkship must be completed for each student by the end of the rotation (See Appendix A for an example). The BUSM Formative Assessment and Feedback Policy can be found here: 
http://www.bumc.bu.edu/busm/education/academic-affairs/policies/formative-assessment-and-feedback/

Best practices regarding feedback include:

- Start with getting the student’s perspective on how they performed or are performing.
- Feedback should be specific and actionable. What could the student do differently next time?
- Feedback should be based on direct observation. i.e. what you have seen.
- Feedback should be timely (in close proximity to when you observed a behavior).
- Feedback should be respectful and encourage future growth.

EARLY RECOGNITION OF LEARNING PROBLEMS

The clerkship director and the medical school are committed to providing additional educational support as required for the student’s successful completion of the program. The clerkship director should be notified as soon as possible if the preceptor and/or student identify significant deficiencies. This will allow for supportive interventions to be implemented prior to the end of the clerkship.

If a primary faculty is concerned that the student may be at risk of receiving an unsatisfactory rating in ANY category, this information should be shared with the student face-to-face as soon as possible, and certainly during the mid-clerkship evaluation. Once informed, the student may wish to obtain additional academic assistance from the clerkship director and support personnel. Identifying potential problems early on allows the student the opportunity to enhance performance prior to the end of the clerkship. Faculty should also feel free to contact the clerkship director if learning difficulties or related problems are identified at any time. However, in fairness to the student, the primary faculty should also inform the student of the problem at that time.

MID ROTATION MEETING

The clinical faculty/site director should sit privately with the student at the mid-point in the rotation to give feedback. It is highly recommended that the faculty working directly with the student complete a copy of the Clinical Student Evaluation Form (CSEF) before the meeting, and then directly address each item on the CSEF with the student to provide more detailed feedback about how they are performing. Feedback for the student, including strengths and areas that need improvement should be reviewed (See Appendix B).

The site director/clerkship director and the student are required to complete the BUSM Mid-clerkship Evaluation form for the mid rotation meeting. Learning goals for the latter half of the clerkship should be discussed. The student’s patient log should be reviewed and a plan should be made for remediation of any deficiencies (e.g. strategizing how the student could see a patient with that clinical condition, discussing opportunities to complete the requirement with an alternative experience, etc) The student should update and review the summary statistics of their duty hour log and patient log before their meeting with you. FOCuS forms should also be reviewed (Appendix A).
FINAL GRADE AND NARRATIVE COMMENTS

On the last day at the site, the site director and student are to meet for 15-30 minutes to review the mid/final Clinical Student Evaluation Form. This session should allow for an important educational interchange between the clinical site director/faculty and the student. We strongly suggest that evaluations from other faculty and residents with whom the student has worked be collected, and that the evaluation form be completed by the site director PRIOR TO the meeting with the student if at all possible. This information is very important to students and is best reviewed with them directly. If you are unable to complete the evaluation form before the final interview, please submit it no later than one week after the end of the clerkship block. It should reflect as closely as possible the substance of your discussion with the student. The narrative portion of the form is especially important.

The comments sections of the CSEF are very important. The more specific you are, including examples, the more helpful the evaluation is to the student and the medical school. The **summative** comments get put in the students’ Dean’s letters that go out to residency programs- so having accurate, detailed information is very helpful. This box is where you should put what you observe about the student, trying to highlight their strengths and specifics of their performance. The second box is for **areas for improvement**. These are comments that are not included in the Dean’s letter. These are the constructive comments for the student-areas to work on, ways they can grow. We encourage every preceptor to provide information to the student in this section so that the student can have direction in what they need to work on in the future.

*Example Narrative Comments:*

This is an example of the type of summative comments that the medical school is looking for from one of our sites: (the student’s name has been replaced to maintain their anonymity)

“Rocco did an excellent job during his Medicine Clerkship. He is able to develop rapport with patients very quickly and meaningfully. He avoids medical jargon when speaking to patients. He is able to identify the patient’s major problems and reason through the most likely diagnosis. His physical exams skills are accurate. He should continue to think about his differential when completing his exam. He generates well thought out differential diagnoses and is able to routinely provide a rationale for his most likely diagnosis. By the end of the rotation, Rocco was able to discuss parts of the plan with the patient and do some brief patient education on nutrition and exercise. His progress notes were always appropriate, well organized, timely, and complete. His case presentations were organized, focused and complete. Rocco demonstrated a solid fund of knowledge right from the beginning and was able to answer questions. He should continue to explore the use of point of care resources in the clinical setting. He exhibited a very calm and professional manner when working with patients, putting them at ease and allowing for more effective and empathetic communication. He was active in the learning process. He routinely identified what he wanted to learn from the rotation and continued to work on those items up to the very last minute of the rotation. He exhibited a professional attitude towards the clinic staff and patients.”

*Adapted from the Family Medicine’s Preceptor Manual, written by Miriam Hoffman, MD and Molly Osher-Cohen, MD
Updated 4/2018, 5/2019, Medical Education Office*
HOME VISIT

Certain clerkships have home visits. Primary faculty need to provide complete instructions regarding the home visit and expectations for the student.

Home visit safety

Student and patient safety is a priority for home visits. **Students are required to go to their home visit with another student or clinician (MD, NP, RN, Resident, etc).** At no time should a student participate in an experience where they are in danger or feel uncomfortable. Please assist the student in finding an appropriate patient for their home visit with respect to educational, patient care, logistical, and safety goals. Students are encouraged to talk with their preceptor or the clerkship director if they have questions or concerns at any point. The student should notify the primary preceptor or a designated staff member of the date and location of their home visit before they go to the patient’s home.

IMPORTANT CLERKSHIP POLICIES

Attendance Policies

On-site hours must be limited to 80 hours per week, averaged over a two-week period. Violations should be reported directly to the clerkship director or to an Associate Dean (Medical Education or Student Affairs). Time off requests must comply with the Attendance & Time Off Policy.

- **Work Hours:** [http://www.bumc.bu.edu/busm/education/medical-education/policies/work-hours/](http://www.bumc.bu.edu/busm/education/medical-education/policies/work-hours/)
- **Core Clerkship Personal Days Policy:** [http://www.bumc.bu.edu/busm/education/medical-education/policies/personal-days-policy/](http://www.bumc.bu.edu/busm/education/medical-education/policies/personal-days-policy/)

Appropriate Treatment in Medicine

Boston University School of Medicine (BUSM) is committed to providing a work and educational environment that is conducive to teaching and learning, research, the practice of medicine and patient care. This includes a shared commitment among all members of the BUSM community to respect each person’s worth and dignity, and to contribute to a positive learning environment where medical students are enabled and encouraged to excel.

BUSM has a ZERO tolerance policy for medical student mistreatment. Students who have experienced or witnessed mistreatment are encouraged to report to the Appropriate Treatment in Medicine Committee (ATM), Dr. Robert Vinci at Bob.vinci@bmc.org

Boston University Sexual Misconduct/Title IX Policy

Needle Sticks and Exposure Procedure
http://www.bumc.bu.edu/busm/student-affairs/additional-student-resources/needle-stickexposure/
(See Appendix C)
FOCUS: Feedback and Observation of Clinical (UME) Students

DOCUMENTATION

Please review student’s documentation and provide them with feedback based on the behaviors listed below

- Ask student about specific areas they want to work on or areas you should focus your review/feedback
- Encourage student assessment
- Describe specific behaviors—use CSEF language below as prompts

<table>
<thead>
<tr>
<th>Target Behaviors</th>
<th>Check if observed</th>
</tr>
</thead>
<tbody>
<tr>
<td>1) Documents history and physical exam in a complete, accurate and organized fashion</td>
<td></td>
</tr>
<tr>
<td>2) Independently (not cut and pasted) completes note in a timely fashion</td>
<td></td>
</tr>
<tr>
<td>3) Write-up is focused around the primary problem</td>
<td></td>
</tr>
<tr>
<td>4) Problem list is appropriately documented and prioritized</td>
<td></td>
</tr>
<tr>
<td>5) Documents a well-developed synthesis statement (that includes a commitment to a leading diagnosis and/or a do not miss diagnosis)</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Reach Behaviors</th>
</tr>
</thead>
<tbody>
<tr>
<td>6) Displays diagnostic reasoning using pertinent positives and negatives and key findings that imply the differential in the history, physical and assessment</td>
</tr>
<tr>
<td>7) Clinical reasoning is clear, logical and convincing</td>
</tr>
<tr>
<td>8) The note concisely emphasizes relevant data; integrates data from all relevant sources (EMR, other facilities, caregiver)</td>
</tr>
<tr>
<td>9) The note incorporates evidence-based data</td>
</tr>
</tbody>
</table>

☐ I directly observed this student
☐ I provided verbal feedback to the student

Student Reflection—What would you change or do differently?
Next steps for student growth developed in collaboration with student (please use above behaviors as guide)

1.
2.
3.

Supervisor Signature ______________________________

---

Adapted from the Family Medicine’s Preceptor Manual, written by Miriam Hoffman, MD and Molly Osher-Cohen, MD
Updated 4/2018, 5/2019, Medical Education Office
FOCUS: Feedback and Observation of Clinical (UME) Students

INTERVIEW AND DATA GATHERING

Please observe the student performing a patient history and provide them with feedback based on the behaviors listed below:

- Prior to observation:
  - Ask student about specific areas they want to work on or areas you should focus your feedback on.
- After you observe:
  - Encourage student assessment.
  - Describe specific behaviors—use CSEF language below as prompts.

### Target Behaviors

<table>
<thead>
<tr>
<th>Behavior</th>
<th>Check if observed</th>
</tr>
</thead>
<tbody>
<tr>
<td>1) Introduces self to patient</td>
<td></td>
</tr>
<tr>
<td>2) Uses mix of open and close ended questions</td>
<td></td>
</tr>
<tr>
<td>3) Follows organized interview framework</td>
<td></td>
</tr>
<tr>
<td>4) Summarizes history back to patient or other check for accuracy</td>
<td></td>
</tr>
<tr>
<td>5) Actively listens and uses nonverbal techniques (e.g. eye contact)</td>
<td></td>
</tr>
<tr>
<td>6) Avoids medical jargon</td>
<td></td>
</tr>
<tr>
<td>7) Identifies and prioritizes patients’ major problems and concerns</td>
<td></td>
</tr>
<tr>
<td>8) Characterizes patient problems and concerns accurately and thoroughly through the history</td>
<td></td>
</tr>
<tr>
<td>9) Clarifies non-specific concerns (e.g. dizzy, numb, weak)</td>
<td></td>
</tr>
<tr>
<td>10) Develops rapport with patient</td>
<td></td>
</tr>
<tr>
<td>11) Completes within appropriate time frame</td>
<td></td>
</tr>
</tbody>
</table>

### Reach Behaviors

<table>
<thead>
<tr>
<th>Behavior</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1) Elicits and responds empathically to patients concerns</td>
<td></td>
</tr>
<tr>
<td>2) Demonstrates patient-centered interview skills (e.g. attends to patients’ verbal/nonverbal cues, culture, social determinants, need for interpretive/adaptive services etc.)</td>
<td></td>
</tr>
<tr>
<td>3) Uses differential to drive data gathering</td>
<td></td>
</tr>
<tr>
<td>4) Probes for relevant, subtle details</td>
<td></td>
</tr>
<tr>
<td>5) Integrates information from the patient and from other relevant resources (e.g. EMR, caregiver, witness, outside records)</td>
<td></td>
</tr>
</tbody>
</table>

☐ I directly observed this student
☐ I provided verbal feedback to the student

**Student Reflection**—What would you change or do differently?

Next steps for student growth developed in collaboration with student (please use above behaviors as guide)

1.
2.
3.

Supervisor Signature ______________________________

---

Adapted from the Family Medicine’s Preceptor Manual, written by Miriam Hoffman, MD and Molly Osher-Cohen, MD

Updated 4/2018, 5/2019, Medical Education Office
FOCUS: Feedback and Observation of Clinical (UME) Students

ORAL PRESENTATIONS

Please observe the student performing an oral presentation and provide them with feedback based on the behaviors listed below.

- Prior to observation:
  - Ask student about specific areas they want to work on or areas you should focus your feedback on

- After you observe:
  - Encourage student assessment
  - Describe specific behaviors - use CSEF language below as prompts

Target Behaviors

1) Delivers well-organized presentation for this patient encounters

2) Accurately reports patient data (history, exams, tests)

3) Delivers presentation that is focused, concise and flows well

4) Oral presentation demonstrates appropriate level of confidence

Reach behaviors

5) Organization of the history and physical demonstrates a differential diagnosis-driven presentation

6) Presentation is customized to the listener(s), working environment and time available

7) Presentation is clear, logical and convincing

☐ I directly observed this student
☐ I provided verbal feedback to the student

Student Reflection - What would you change or do differently?

Next steps for student growth developed in collaboration with student (please use above behaviors as guide)

1. 

2. 

3. 

Student Name: ___________________________ Date______________________
Observer Name: _________________________ Clerkship: _____________________
Circle One: Attending Fellow Resident Clerkship week #: ____________________

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Updated 4/2018, 5/2019, Medical Education Office
FOCUS: Feedback and Observation of Clinical (UME) Students

PHYSICAL EXAM

Please observe the student performing a **physical exam** on a patient they are caring for and provide them with feedback based on the behaviors listed below.

- **Prior to observation:**
  - Ask student about specific areas they want to work on or areas you should focus your feedback on
- **After you observe:**
  - Encourage student assessment
  - Describe specific behaviors - use CSEF language below as prompts

<table>
<thead>
<tr>
<th>Target Behaviors</th>
<th>Check if observed</th>
</tr>
</thead>
<tbody>
<tr>
<td>1) Uses correct exam techniques</td>
<td></td>
</tr>
<tr>
<td>2) Identifies and interprets findings accurately</td>
<td></td>
</tr>
<tr>
<td>3) Performs all relevant exam techniques in an appropriate amount of time</td>
<td></td>
</tr>
<tr>
<td>4) Performs exam in a patient-sensitive manner</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Reach behaviors</th>
</tr>
</thead>
<tbody>
<tr>
<td>5) Demonstrates focused, efficient and systematic exam on all relevant systems</td>
</tr>
<tr>
<td>6) Exam is driven by differential diagnosis</td>
</tr>
<tr>
<td>7) May identify and interpret even subtle findings accurately</td>
</tr>
</tbody>
</table>

☐ I directly observed this student
☐ I provided verbal feedback to the student

**Student Reflection** - What would you change or do differently?

Next steps for student growth developed in collaboration with student (please use above behaviors as guide)

1.

2.

3.

**Supervisor Signature** ______________________________
MID/END CLERKSHIP EVALUATION FORM

Student Name: ________________________________  
Faculty Reviewer: ________________________________

During the Mid/End Clerkship Meeting, faculty and student should meet, complete, discuss, and sign the Mid/End Clerkship Review form (this paper) in weeks 4 and 8 of the Medicine clerkship.

Step 1: Faculty please complete a Mid/End Clerkship CSEF, review each domain with the student and provide feedback and/or review completed FOCUS Forms with the student.

Step 2: Please review student’s required patient encounter log, duty hour log and their FOCUS forms

PATIENT ENCOUNTER LOG (REQUIRED DIAGNOSES)  
Review complete:  Yes ☐  No ☐
Required patient encounters remaining:
Plan and timeline for completion or alternative experiences:

FOCUS FORMS  
Review complete:  Yes ☐  No ☐
Direct Observation and Feedback Forms Remaining:
Plan and timeline for completion:

SOCS CARDS  
Review complete:  Yes ☐  No ☐
SOCS cards remaining:
Plan and timeline for completion:

DUTY HOUR LOG  
Review complete:  Yes ☐  No ☐

Step 3: Written feedback with CSEF review.

Clerkship and site directors are encouraged to review CSEF forms (Completed forms or Blank) with the student. Special attention should be placed on incorporating narrative comments into the student’s performance across the 13 CSEF domains. Students should be reminded that this is intended not to indicate their current grade, but to establish a performance improvement plan.

List AT LEAST 2 SPECIFIC student strengths and comments on their performance (List behaviors, skills, etc.)
List AT LEAST 2 SPECIFIC items to work on during the second half of the clerkship or throughout the 3rd year (discuss action plan with student):

Please provide feedback on professionalism:

Step 4: Action Plan

Students: Write 3 learning goals for the rest of the rotation based on the feedback you received and discuss them with your faculty reviewer

1. 

2. 

3. 

Student signature ____________________________________

Faculty signature ____________________________________

Clerkship director signature ____________________________
(if not the same as above)
SUMMATIVE COMMENTS (REQUIRED):
Please provide a narrative of the student’s performance ensuring that they correspond with the CSEF domains.

FORMATIVE COMMENTS (REQUIRED):
Inform student about specific areas on which to work/improve/change, focusing your feedback on areas where they are getting checkmarks below the target behaviors. Please be specific.

Directions: Select ONE descriptor that most accurately reflects the student’s performance based on the behaviors they were most consistently demonstrating at the end of the clerkship.

In this evaluation the following terms are defined as:
Consistently – Student exhibits this behavior ~ 80% of the time
Sometimes – Student exhibits this behavior ~50% of the time
Rarely – Student exhibit this behavior ~ 20% of the time

INTERVIEWING TECHNIQUE

<table>
<thead>
<tr>
<th>Unable to Assess</th>
<th>1= Does not meet threshold for a clinical clerk</th>
<th>2= Threshold for a clinical clerk</th>
<th>2.5= Meets the threshold and some target behaviors</th>
<th>3= Target behaviors for a clinical clerk</th>
<th>3.5= Meets all target behaviors and some reach behaviors</th>
<th>4= Reach behaviors for a clinical clerk</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unable to assess</td>
<td>Consistently: 1) Introduces self to patient</td>
<td>Consistently: 1) Introduces self to patient and develops rapport</td>
<td>Achieves all previous behaviors and</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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<table>
<thead>
<tr>
<th>DATA GATHERING SKILLS</th>
<th>Unable to Assess</th>
<th>1= Does not meet threshold for a clinical clerk</th>
<th>2=Threshold for a clinical clerk</th>
<th>2.5= Meets the threshold and some target behaviors</th>
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<th>3.5= Meets all target behaviors and some reach behaviors</th>
<th>4=Reach behaviors for a clinical clerk</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Unable to Assess</td>
<td>Consistently:</td>
<td></td>
<td>Consistently:</td>
<td></td>
<td>Achieves all previous behaviors and Consistently:</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>1) Implements a templated approach to history</td>
<td></td>
<td>1) Implements a templated approach to history</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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**PHYSICAL EXAM SKILLS**

<table>
<thead>
<tr>
<th>Unable to Assess</th>
<th>Sometimes:</th>
<th>Consistently:</th>
<th>Achieves all previous behaviors and:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1= Does not meet threshold for a clinical clerk</td>
<td>2= Threshold for a clinical clerk</td>
<td>3= Target behaviors for a clinical clerk</td>
</tr>
<tr>
<td></td>
<td>2.5= Meets the threshold and some target behaviors</td>
<td>3= Target behaviors for a clinical clerk</td>
<td>3.5= Meets all target behaviors and some reach behaviors</td>
</tr>
<tr>
<td>Unable to assess</td>
<td>Sometimes:</td>
<td>Consistently:</td>
<td>Achieves all previous behaviors and:</td>
</tr>
<tr>
<td></td>
<td>1) Uses correct exam technique</td>
<td>1) Uses correct exam technique</td>
<td>1) Demonstrates focused, efficient and systematic exam on all relevant systems</td>
</tr>
<tr>
<td></td>
<td>2) Identifies and interprets findings accurately</td>
<td>2) Identifies and interprets findings accurately</td>
<td>Consistently:</td>
</tr>
<tr>
<td></td>
<td>3) Performs all relevant exam</td>
<td>3) Performs all relevant exam</td>
<td>1) Demonstrates focused, efficient and systematic exam on all relevant systems</td>
</tr>
</tbody>
</table>

Adapted from the Family Medicine’s Preceptor Manual, written by Miriam Hoffman, MD and Molly Osher-Cohen, MD

Updated 4/2018, 5/2019, Medical Education Office
### DIFFERENTIAL DIAGNOSIS AND ASSESSMENT SKILLS

<table>
<thead>
<tr>
<th>Unable to Assess</th>
<th>1= Does not meet threshold for a clinical clerk</th>
<th>2= Threshold for a clinical clerk</th>
<th>2.5= Meets the threshold and some target behaviors</th>
<th>3= Target behaviors for a clinical clerk</th>
<th>3.5= Meets all target behaviors and some reach behaviors</th>
<th>4= Reach behaviors for a clinical clerk</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sometimes:</strong></td>
<td></td>
<td></td>
<td></td>
<td>Consistently:</td>
<td>Achieves all previous behaviors without assistance from supervisor and Consistently:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>1) Provides a reasonable differential diagnosis and assessment</td>
<td></td>
<td></td>
<td>1) Provides an accurate patient and context specific differential diagnosis and assessment</td>
<td>1) Explains rationale for differential diagnosis</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2) Able to synthesize relevant information from the history, physical and testing to generate the differential and assessment</td>
<td></td>
<td></td>
<td>2) Able to synthesize relevant information from the history, physical and testing to generate the differential and assessment</td>
<td>2) Commits to an assessment with an accurate leading diagnosis and includes other likely diagnoses and/or most concerning diagnoses</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3) Prioritizes problem list</td>
<td></td>
<td></td>
<td>3) Prioritizes problem list</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Rarely:**

5) Exam is driven by differential diagnosis

**Sometimes:**

5) Exam is driven by differential diagnosis

2) Exam is consistently driven by differential diagnosis

3) May identify and interprets even subtle findings accurately
4) Correctly identifies the most likely diagnosis

4) Explains rationale for differential diagnosis

5) Commits to an assessment with an accurate leading and/or most concerning diagnosis

3) Rank order of probability for the differential is accurate

4) Independently reprioritizes differential diagnosis and problem list based on new findings and data (e.g. labs and imaging)

**MANAGEMENT PLANNING SKILLS**

<table>
<thead>
<tr>
<th>Unable to Assess</th>
<th>1= Does not meet threshold for a clinical clerk</th>
<th>2=Threshold for a clinical clerk</th>
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<th>3=Target behaviors for a clinical clerk</th>
<th>3.5=Meets all target behaviors and some reach behaviors</th>
<th>4=Reach behaviors for a clinical clerk</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unable to Assess</td>
<td>Consistently: 1) Attempts to offer a management plan though it may not be correct 2) Able to provide reasonable management suggestions for common conditions</td>
<td>Consistently: 1) Able to provide reasonable management suggestions for common conditions</td>
<td>Consistently: 1) Able to provide reasonable management suggestions for common conditions</td>
<td>Consistently: 1) Able to provide reasonable management suggestions for both common and uncommon conditions</td>
<td>Consistently: 2) Explains rationale for the plan for common conditions</td>
<td>Consistently: 3) Anticipates future management needs and follow-up plans</td>
</tr>
<tr>
<td></td>
<td>Sometimes: 2) Able to provide reasonable management suggestions for common conditions</td>
<td>Sometimes: 2) Able to provide reasonable management suggestions for less common conditions</td>
<td>Sometimes: 3) Explains rationale for the plan for common conditions</td>
<td>Sometimes: 2) Explains rationale for the plan for common conditions</td>
<td>4) Incorporates the best-available evidence into management planning</td>
<td></td>
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<tr>
<td></td>
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<td></td>
<td></td>
<td>5) Provides specific plans including specific studies, specific medications (vs. medication classes) and basic medication dosing</td>
<td></td>
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</tr>
</tbody>
</table>

Adapted from the Family Medicine’s Preceptor Manual, written by Miriam Hoffman, MD and Molly Osher-Cohen, MD
Updated 4/2018, 5/2019, Medical Education Office
### ORAL PRESENTATION SKILLS

<table>
<thead>
<tr>
<th>Unable to Assess</th>
<th>1 = Does not meet threshold for a clinical clerk</th>
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<th>4 = Reach behaviors for a clinical clerk</th>
</tr>
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<tbody>
<tr>
<td></td>
<td><strong>Consistently:</strong></td>
<td></td>
<td><strong>Consistently:</strong></td>
<td><strong>Consistently:</strong></td>
<td><strong>Achieves all previous behaviors and consistently:</strong></td>
<td><strong>Achieves all previous behaviors and consistently:</strong></td>
</tr>
<tr>
<td></td>
<td>1) Delivers well-organized presentations for straightforward patient encounters</td>
<td></td>
<td>1) Delivers well-organized presentations for all patient encounters</td>
<td>1) Delivers well-organized presentations for all patient encounters</td>
<td>1) Organizes history and physical to demonstrate a differential diagnosis-driven presentation</td>
<td>1) Organizes history and physical to demonstrate a differential diagnosis-driven presentation</td>
</tr>
<tr>
<td></td>
<td>2) Accurately reports patient data (history, exams, tests)</td>
<td></td>
<td>2) Accurately reports patient data (history, exams, tests)</td>
<td>2) Accurately reports patient data (history, exams, tests)</td>
<td>2) Customizes presentation to the listener(s), working environment and time available</td>
<td>2) Customizes presentation to the listener(s), working environment and time available</td>
</tr>
<tr>
<td></td>
<td>3) Presentations include all vital information</td>
<td></td>
<td>3) Delivers presentations that are focused, concise and flow well</td>
<td>3) Delivers presentations that are focused, concise and flow well</td>
<td>3) Presentations are clear, logical and convincing</td>
<td>3) Presentations are clear, logical and convincing</td>
</tr>
<tr>
<td></td>
<td><strong>Sometimes:</strong></td>
<td></td>
<td><strong>Sometimes:</strong></td>
<td><strong>Sometimes:</strong></td>
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</tr>
<tr>
<td></td>
<td>4) Presentations flow well</td>
<td></td>
<td>4) Demonstrates appropriate level of confidence during the oral presentation</td>
<td>4) Demonstrates appropriate level of confidence during the oral presentation</td>
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<tr>
<td></td>
<td>5) Demonstrates appropriate level of confidence during the oral presentation</td>
<td></td>
<td><strong>Sometimes:</strong></td>
<td><strong>Sometimes:</strong></td>
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<td></td>
<td>5) Organizes history and physical to demonstrate a differential diagnosis-driven presentation</td>
<td></td>
<td>5) Organizes history and physical to demonstrate a differential diagnosis-driven presentation</td>
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<tbody>
<tr>
<td></td>
<td>Sometimes:</td>
<td>Consistently:</td>
<td>Achieves all previous behaviors and:</td>
<td></td>
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<tr>
<td></td>
<td>1) Provides information that is both accurate and an appropriate amount</td>
<td>1) Provides information that is both accurate and an appropriate amount</td>
<td>1) Proactively finds the opportunity to provide patients with education</td>
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<tr>
<td></td>
<td>2) Uses language familiar to the patient (avoids medical jargon)</td>
<td>2) Uses language familiar to the patient (avoids medical jargon)</td>
<td>2) Elicits patient’s understanding, perspective and readiness to implement plan</td>
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<tr>
<td></td>
<td>3) Takes the opportunity to provide patients with education</td>
<td>3) Takes the opportunity to provide patients with education</td>
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<td></td>
<td></td>
<td>4) Works with patients to emphasize the most important components of plan</td>
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<td></td>
<td></td>
<td>5) Provides appropriate depth of information</td>
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### DOCUMENTATION SKILLS:

<table>
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<td>Achieves all previous behaviors and</td>
<td>Consistently:</td>
<td>Achieves all previous behaviors and</td>
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<tr>
<td></td>
<td></td>
<td>1) Documents history and physical exam in an accurate and organized fashion</td>
<td></td>
<td>Consistently:</td>
<td>1) Notes are complete, accurate and organized</td>
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</tr>
<tr>
<td></td>
<td></td>
<td>2) Completes notes in a timely fashion</td>
<td></td>
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<td>2) Documents a well-developed synthesis statement (that includes a commitment to a leading diagnosis and/or a do not miss diagnosis)</td>
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<td></td>
<td>3) Problem list is appropriately documented in note</td>
<td></td>
<td></td>
<td>3) Problem list is appropriately prioritized</td>
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<tr>
<td></td>
<td></td>
<td>4) Write-up is focused around the primary problem</td>
<td></td>
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<td><strong>Sometimes:</strong></td>
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<td></td>
<td></td>
<td>5) Independently creates the note (not cut and pasted)</td>
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### MEDICAL KNOWLEDGE:

<table>
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<tr>
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<table>
<thead>
<tr>
<th>Unable to Assess</th>
<th>Consistently:</th>
<th>Consistently:</th>
<th>Achieves all previous behaviors and:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1) Demonstrates a basic understanding of the biomedical, clinical and social science dimensions of care</td>
<td>1) Demonstrates a strong, broad-based fund of knowledge in the biomedical, clinical and social science dimensions of care, and is able to apply this knowledge to most clinical situations</td>
<td>1) Skillfully applies knowledge to clinical situation</td>
</tr>
<tr>
<td></td>
<td>Sometimes: 2) Can answer questions by drawing on their preclinical knowledge</td>
<td>2) Can answer questions by drawing on their preclinical knowledge</td>
<td>2) Incorporates new evidence-based data when relevant</td>
</tr>
<tr>
<td></td>
<td>Achieves all previous behaviors and: 1) Skillfully applies knowledge to clinical situation 2) Incorporates new evidence-based data when relevant 3) Acknowledges that variations in care exist based on current evidence</td>
<td></td>
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</tbody>
</table>

### SELF-DIRECTED LEARNING SKILLS

<table>
<thead>
<tr>
<th>Unable to Assess</th>
<th>Self-Directed Learning Skills</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<tr>
<td></td>
<td>2=Threshold for a clinical clerk</td>
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<td>3.5= Meets all target behaviors and some reach behaviors</td>
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<td></td>
<td>4=Reach behaviors for a clinical clerk</td>
</tr>
</tbody>
</table>

| Unable to assess | Sometimes: 1) Develops appropriate clinical questions and identifies appropriate resources to answer questions 2) Demonstrate an awareness of his/her own learning needs and limitations and addresses them 3) Independently asks for and makes effort to incorporate feedback 4) Makes efforts to teach others what they learned | Consistently: 1) Develops appropriate clinical questions and identifies appropriate resources to answer questions 2) Demonstrates an awareness of his/her own learning needs and limitations and addresses them 3) Independently asks for and makes effort to incorporate feedback 4) Effectively teaches others what they learned | Achieves all previous behaviors and: 1) Develops well-formed clinical questions, critically assesses and incorporates data into patient care based on the best available evidence 2) Independently asks for feedback, incorporates feedback and demonstrates growth over time |

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<tbody>
<tr>
<td></td>
<td>Consistently:</td>
<td></td>
<td>Consistently:</td>
<td>Achieves all previous behaviors and:</td>
<td></td>
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</tr>
<tr>
<td></td>
<td>1) Shows patients respect, empathy and compassion</td>
<td></td>
<td>1) Shows patients respect, empathy and compassion</td>
<td>1) Incorporates patients’ perspectives (cultural, social, emotional etc.) into the evaluation and care of patients</td>
<td>2) Consistently succeeds in proactively addressing needs of patients</td>
<td>3) Gains the confidence and trust of patients</td>
</tr>
<tr>
<td></td>
<td>Sometimes:</td>
<td></td>
<td>2) Builds rapport with patients</td>
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<tr>
<td></td>
<td>2) Builds rapport with patients</td>
<td></td>
<td>3) Sensitive to patients’ needs &amp; sociocultural perspectives</td>
<td>2) Consistently succeeds in proactively addressing needs of patients</td>
<td>3) Gains the confidence and trust of patients</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3) Sensitive to patients’ needs &amp; sociocultural perspectives</td>
<td></td>
<td>4) Tries to proactively address the needs of patients</td>
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<td></td>
<td>5) Recognizes emotional cues from patients and tries to address them</td>
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5) Knows when to ask for help

HUMANISTIC CONDUCT

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**PROFESSIONALISM**

<table>
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<th>4= Reach behaviors for a clinical clerk</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consistently:</td>
<td>1) Prepared</td>
<td>Achieves all previous behaviors and:</td>
<td>Achieves all previous behaviors and:</td>
<td>Achieves all previous behaviors and:</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>2) Punctual</td>
<td>1) Demonstrates a willingness to add responsibilities to contribute to patient care</td>
<td>1) Consistently and effectively self-initiates added responsibilities to contribute to patient care</td>
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<tr>
<td></td>
<td>3) Reliably completes assigned patient care tasks</td>
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<td>4) Maintains confidentiality</td>
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<tr>
<td></td>
<td>5) Respects patients, staff and colleagues</td>
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</table>
## TEAM BUILDING SKILLS

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<tr>
<th>Unable to Assess</th>
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<tr>
<td><strong>Unable to Assess</strong></td>
<td><strong>Consistently:</strong></td>
<td><strong>Achieves all previous behaviors and:</strong></td>
<td><strong>Achieves all previous behavior and:</strong></td>
<td><strong>Achieves all previous behavior and:</strong></td>
<td><strong>Achieves all previous behavior and:</strong></td>
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</tr>
<tr>
<td></td>
<td>1) Completes requested activities</td>
<td>1) Integrates into team function, prioritizing team goals</td>
<td>1) Anticipates and responds to team needs</td>
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<tr>
<td></td>
<td>2) Identifies roles of interprofessional team members</td>
<td>2) Communicates effectively with interprofessional team</td>
<td>2) Identifies when hospital and community team members (e.g. consults, referrals, PT, social work, VNA) will improve patient care</td>
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<tr>
<td></td>
<td>3) Recognizes his/her own role on the team</td>
<td>3) Keeps team members informed and up to date</td>
<td>3) Actively listens to team members' recommendations, and incorporates these recommendations into practice</td>
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<td>4) Demonstrates respectful interactions and is trustworthy</td>
<td>4) Is open to interprofessional team members’</td>
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Appendix C: BUSM Needle Sticks and Exposure Procedure

Boston University School of Medicine Needle Sticks and Exposure Procedure

Purpose: To outline appropriate preventative measures and what to do in case of unprotected exposure to body fluids.

Covered Parties: Medical students.

Procedure:
To prevent exposure to potentially infectious materials, students must use standard precautions with all patients and when performing any task or procedure that could result in the contamination of skin or clothing with blood, body fluids, secretions, excretions (except sweat), or other potentially infectious material, regardless of whether the those fluids contain visible blood.

Standard precautions are to be observed to prevent contact with blood or other potentially infectious materials. ALL body fluids are considered potentially infectious materials. All students are responsible for their personal safety and the safety of their teammates. Students should follow safe practices when handling sharps. Students must use appropriate personal protective equipment such as, but not limited to, gloves, gowns, laboratory coats, face shields or masks and eye protection, and mouthpieces, resuscitation bags, pocket masks, or other ventilation devices.

Standard Precautions include:
- Hand hygiene
- Eye and face protection
- Use of gowns and gloves
- Sharps management

Additional “Transmission Based Precautions” must be used in addition to standard precautions for patients with known or suspected infection or colonization with highly transmissible or epidemiologically important pathogens.

In the event of a needle stick or any unprotected exposure to blood, bloody body fluids, or other potentially infectious material, either in a lab or a clinical setting you should:
- Wash the exposed area and perform basic first aid
- Notify your supervisor – resident or faculty – of the occurrence and that you are leaving to seek care immediately.
- Get evaluated immediately: it is extremely important to receive counseling regarding the risk of acquiring a communicable disease. If indicated, prophylaxis should be started right away, usually within one hour.

If you are at Boston Medical Center

BMC’s Occupational Health clinic during working hours or the BMC Emergency Department after hours and on weekends

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Updated 4/2018, 5/2019, Medical Education Office
Location
The Working Well Occupational Health Clinic is located:
Doctor's Office Building (DOB 7) - Suite 703
720 Harrison Ave, Boston MA 02118

Telephone: 617-638-8400
Pager: 3580
Fax: 617- 638-8406
E-mail: workingwellclinic@bmc.org
Hours: Monday-Friday, 7:30a.m. - 4:00p.m.

- Tell the receptionist you have had an unprotected exposure (needle stick), and you will be fast-tracked into the clinic.
- A counselor will discuss post-exposure prophylaxis with you
- DO NOT DELAY!

BMC’s Occupational Health will notify the Office of Student Affairs of exposures occurring at BMC within 48 hours. These situations can be very stressful and we are here to help. To speak to a dean immediately about the incident, please page the dean on duty by calling (617) 638-5795 and sending a page to #4196 or sending a text page to pager #4196 through the pager directory.

If you are at a non-Boston Medical Center site

Immediately check with your supervising physician about the site-specific needle-stick protocol

- If the site has its own emergency room or occupational health you will be directed to go there
- If the site does not have its own emergency room or occupational health, you will go to the nearest emergency room
- DO NOT DELAY!

Coverage for provided services is included in the Aetna student health insurance plan offered by the University. In the event that you do not have Boston University School of Medicine health insurance (Aetna), you must contact your carrier and determine the level of services covered. Submit any billing received to your insurance company. The OSA will provide reimbursement for out-of-pocket co-pays. We strongly encourage you to keep your health insurance card in your wallet at all times.

For questions regarding this policy please contact Dr. John Polk, the assistant dean in charge of post-exposure management, or Dr. Angela Jackson, Associate Dean of Student Affairs. Drs. Jackson and Polk can be reached in the Office of Student Affairs (617-358-7466).

Revised Jan 2018