



POLICY TITLE

Clinical Site and Clinical Instructional Faculty Recruitment and Monitoring

PURPOSE AND SCOPE

The purpose of this policy is to clearly articulate the policy and procedures addressing clinical site and preceptor recruitment and monitoring to include program, student, and institutional responsibilities. This policy also includes program procedures regarding maintenance of clinical instructor curriculum vitae's, licensure and board certifications.

ARC-PA STANDARD ADDRESSED

A1.01: When more than one institution is involved in the provision of academic and/or clinical education, responsibilities of the respective institution and supervision of students must be clearly described and documented in a manner signifying agreement by the involved institutions. Signed affiliation agreement(s) must define the responsibilities of each party related to the educational program for students, must specify who policies govern, and must document student access to educational resources and clinical experiences. While one agreement between the sponsoring institution and each clinical entity to cover multiple professional disciplines is acceptable, these agreements are expected to include specific notations acknowledging the terms of participation between the PA Program and each clinical faculty. Agreements are expected to be signed by the authorized individual(s) of each participating entity.

A1.02: The sponsoring institution is responsible for:

- (a) documenting appropriate security and personal safety measures for students and faculty in all locations where instruction occurs.

A1.10: The sponsoring institution must support the program in:

- (a) securing clinical sites and preceptors sufficient in number to allow all students to meet the program's learning outcomes for supervised clinical practice experiences
- (b) ensuring all required rotations are located within the United States.

A2.16: The program must:

- (a) verify and document that all instructional faculty actively serving as supervised clinical practice experience preceptors hold a valid license that allows them to practice at the clinical site

A2.17: In each location to which a student is assigned for supervised clinical practice experiences, the program must:

- (b) orient all instructional faculty to specific learning outcomes it requires of students.

A3.02: The program must define, publish, make readily available and consistently apply its policies and practices to all students.

A3.03: The program must define, publish, make readily available and consistently apply a policy for prospective and enrolled students that they must not be required to provide or solicit clinical sites or preceptors.

C2.01: The program must define and maintain effective processes and document the initial and ongoing evaluation of all sites and preceptors used for supervised clinical practice experiences to ensure students are able to fulfill program learning outcomes with access to:

- (a) physical facilities
- (b) patient populations, and
- (c) supervision



RESPONSIBLE PARTY AND REVIEW CYCLE

This policy will be reviewed even-numbered years as needed by the Clinical Affairs Team, elevating any policy amendments to the Program Director for approval.

DEFINITIONS

Supervised Clinical Practice Experiences (SCPEs) include family medicine, outpatient general pediatrics, internal medicine (inpatient), emergency medicine, psychiatry & behavioral health, women's health & prenatal care, surgery, primary care, and elective clinical learning experiences.

POLICY

With the support of UNC School of Medicine and Department of Allied Health Sciences, the Division of Physician Assistant Studies assumes responsibility for the recruitment of clinical sites and clinical instructors in sufficient numbers for the program-mandated supervised clinical practice experience component of the curriculum. Students will not be required to provide or solicit clinical instructors or clinical sites for the program mandated clinical experiential learning component of the program. All active clinical sites must hold a current affiliation agreement with the UNC-CH MHSPAS program. All new/current clinical instructors must hold a valid license and specialty certification. All clinical instructor licensures, curriculum vitae, and specialty certifications will be maintained and monitored in the eMedley learning managements system. All new clinical instructors and clinical sites will be provided an UNC-CH MHSPAS Program Clinical Instructor/Site Onboarding Pamphlet.

Students may voluntarily submit to the UNC-CH MHSPAS Clinical Affairs Teams the name(s) of potential clinical instructors and/or clinical sites not already affiliated with the UNC-CH MHSPAS program; however, the potential clinical instructors and/or clinical sites must agree to host future students from the UNC-CH MHSPAS Program. There is no direct or implied guarantee on the part of the program that the student will be assigned a clinical learning experience with any requested clinical instructor or clinical site, including those already affiliated with the program. It is ultimately the responsibility of the UNC-CH MHSPAS Clinical Affairs Team and the Program Director to judge whether the clinical instructor and clinical site are deemed appropriate for use in SCPEs.

All core SCPEs (family medicine, internal medicine (inpatient), primary care, emergency medicine, surgery, women's health & prenatal care, psychiatry & behavioral health, and outpatient general pediatrics) are required to be completed at program approved sites in North Carolina.

Depending on program approval, logistics & scheduling, and a signed affiliation agreement with the site and program, students may have their elective SCPE(s) completed out-of-state at a program approved clinical site with a program approved clinical instructor.

The UNC-CH MHSPAS program requirements for health care providers are clinical instructors will consist primarily of practicing Physicians and Physician Assistants in the following core rotations: family medicine, internal medicine (inpatient), surgery, pediatrics, women's health, emergency medicine, and behavioral medicine. Physician and Physician Assistants practicing in various subspecialties may be utilized for the SCPE elective rotations. Other license health care providers experiences in their area of instructions (i.e., Nurse Practitioners, Midwives, Social Workers, Psychologists) may be designated as preceptors for SCPEs, as the Program deems necessary and appropriate.

PROCEDURES

- **Curriculum Vitae (CV):** Potential clinical instructional faculty must submit a current CV to the UNC-CH MHSPAS Clinical Affairs Team. A copy of the CV will be uploaded into the experiential management system eMedley, and expiration date will be annotated.
 - **Maintenance of CV:** Active clinical instructor CV's must be updated in eMedley every five years or sooner if there are significant changes. eMedley will send an automatic email to the program and the clinical instructor within 60 days from CV expiration to submit an updated CV to the program to be uploaded into eMedley.
- **Formal initial site visit (in-person or video conference):** The UNC-CH MHSPAS Clinical Affairs Team will perform a formal initial site visit to validate and verify the clinical site has sufficient resources to provide broad experiential learning opportunities in a safe environment in the corresponding clinical practice (e.g., family medicine, general surgery, etc.) for which the physician assistant student will be assigned at the site. Documentation by the program during the formal site visit includes, but is not limited to, clinical site security and safety, clinical site access, workspace, patient exam rooms, support personnel, and diversity and average number of patient encounters of the designated specialty content. Information from the initial site visit will be updated in the clinical site page in eMedley.

Additionally, during the initial formal site visit, the UNC-CH MHSPAS Clinical Affairs Team will orientate the new clinical instructor and site on the following but not limited to: (1) program specific learning outcomes, (2) program syllabus for the respective clinical experience, (3) program policies related to the clinical phase, (4) program homepage for clinical instructors which includes readily accessible information on professional development, program required learning outcomes, program required assessments, program policies, program curriculum, and quarterly newsletter

- **Affiliation Agreement:** After the formal site visit of the clinical site from the UNC-CH MHSPAS Clinical Affairs Team and approval of the clinical site and clinical instructor from the UNC-CH MHSPAS Clinical Affairs Team, the clinical sites must establish a formal Affiliation Agreement with the UNC School of Medicine and UNC Department of Allied Health Sciences. The Affiliation Agreement is coordinated between the UNC-CH MHSPAS Program Specialist, UNC-CH Legal, and the Clinical Site. The process can sometimes take up to three months or more to complete. There are extenuating circumstances that an affiliation agreement will not be completed and/or signed.
- **Licensure:** Health care professionals approved as clinical instructors by the UNC-CH MHSPAS Clinical Affairs Team must hold a valid license within the state in which they will be providing SCPEs for program students. The UNC-CH MHSPAS Clinical Affairs Team will verify licensure status at the time of initial clinical instructor evaluation by way of <http://www.ncmedboard.org/> or respective state medical board for out-of-state health care professional, and again when the certification is due to expire, to confirm license renewal as long as the health care professional remains an active clinical instructor for the UNC-CH MHSPAS Program.

If the program is unable to locate the potential clinical instructors license, the program will request the clinical instructor to provide a current copy. Within eMedley, the UNC-CH MHSPAS Clinical

Affairs Team is able to provide a full list of all current supervised clinical practice experience clinical instructors, along with current licensure information and expiration dates.

- **Maintenance of Licensure:** A copy of the licensure will be uploaded into the eMedley, and the uploaded date & expiration date will be annotated. eMedley will send an automatic email to the program and the clinical instructor within 60 days from licensure expiration for an updated copy to be uploaded in eMedley.

Clinical instructors at UNC Medical Center and UNCPN, the credentialing office will monitor licensure certification and notify the Director of Clinical Education if the clinical instructor is no longer credentialed at UNC Hospitals or UNCPN as stated on letter of memorandum from the respective credentialing office.

- **Specialty Certification:** Health care professionals approved as clinical instructors by the UNC-CH MHSPAS Clinical Affairs Team must hold a valid certification that allows them to practice in the area of instruction. Physician clinical instructors must be American Board of Medical Specialties (ABMS), or American Osteopathic Association (AOA) board certified in the specialty for which they are providing supervised learning experiences for program students. Physician assistant clinical instructors must be board certified through National Certification of Physician Assistants (NCCPA). Nurse Practitioner clinical instructors must be board certified through National Council of State Boards of Nursing (NCSBN). Other licensed health care providers must hold a valid certification in their specialty. Within eMedley, the UNC-CH MHSPAS Clinical Affairs Team is able to provide a full list of all current supervised clinical practice experience clinical instructors, along with current specialty certification information and expiration dates.
 - Specialty board certification of ABMS physicians is confirmed by the UNC-CH MHSPAS Clinical Affairs Team at the time of initial evaluation of the potential/current clinical instruction by way of: (All Specialties and Subspecialties)
<https://www.certificationmatters.org/>; (Emergency Medicine)
<https://www.abem.org/public/about-abem/who-is-abem-certified>; (Surgery)
<https://www.absurgery.org/default.jsp?aboutinquiries>; (Pediatrics)
<https://www.abp.org/verification-certification>; (Internal Medicine)
<https://www.abim.org/verify-physician.aspx>; (Psychiatry and Neurology)
<https://apps.abpn.com/verifycert/>; (Obstetrics and Gynecology)
<https://www.abog.org/verify-physician>; (Family Medicine)
<https://portfolio.theabfm.org/diplomate/find.aspx>. If the program is unable to locate the potential clinical instructors board certification, the program will request the clinical instructor to provide a current copy.
 - **Maintenance of Specialty Certification:** A copy of board clinical instructors' specialty certification will be uploaded into the eMedley, and the uploaded date & expiration date will be annotated. If there is no expiration date on the board certification, the program will verify board certification annually for active clinical instructors. eMedley will send an automatic email to the program and the clinical instructor within 60 days from board certification expiration for an updated copy to be uploaded in eMedley as long as the health care professional remains an active clinical instructor for the UNC-CH MHSPAS Program.

- Specialty board certification of AOA physicians is confirmed by the UNC-CH MHSPAS Clinical Affairs Team at the time of initial evaluation of the potential clinical instruction by way of the potential/current instructional faculty providing a copy of the specialty board certification to the program.
 - **Maintenance of Specialty Certification:** A copy of clinical instructors' board specialty certification will be uploaded into the eMedley, and the uploaded & expiration date will be annotated. If there is no expiration date on the board certification, the program will verify board certification annually for active clinical instructors. eMedley will send an automatic email to the program and the clinical instructor within 60 days from board certification expiration for an updated copy to be uploaded in eMedley as long as the health care professional remains an active clinical instructor for the UNC-CH MHSPAS Program.
- Physician Assistant NCCPA certification is confirmed by at the time of initial evaluation of the potential clinical instruction by way of: <https://portal.nccpa.net/verifypac>. If the program is unable to locate the potential clinical instructor's certification, the program will request the clinical instructor to provide a current copy.
 - **Maintenance of Certification:** A copy of the clinical instructors' NCCPA certification will be uploaded into the eMedley and the uploaded date & expiration date will be annotated. eMedley will send an automatic email to the program and the clinical instructor within 60 days from NCCPA certification expiration for an updated copy to be uploaded in eMedley as long as the health care professional remains an active clinical instructor for the UNC-CH MHSPAS Program.
- Nurse Practitioner certification is confirmed by the UNC-CH MHSPAS Clinical Affairs Team at the time of initial evaluation of the potential clinical instruction by way of: <https://www.nursys.com/LQC/LQCTerms.aspx>. If the program is unable to locate the potential clinical instructors board certification, the program will request the clinical instructor to provide a current copy.
 - **Maintenance of Certification:** A copy of the clinical instructors' NP certification will be uploaded into the eMedley, and the uploaded date & expiration date will be annotated. eMedley will send an automatic email to the program and the clinical instructor within 60 days from NP certification expiration for an updated copy to be uploaded in eMedley as long as the health care professional remains an active clinical instructor for the UNC-CH MHSPAS Program.
- Other licensed health care providers must hold a valid certification in their specialty. Specialty certification of other license health care providers is confirmed by the UNC-CH MHSPAS Clinical Affairs Team at the time of initial evaluation of the potential clinical instruction by way of the potential/current instructional faculty providing a copy of the specialty certification to the program.
 - **Maintenance of Specialty Certification:** A copy of clinical instructors' specialty certification will be uploaded into the eMedley, and the uploaded & expiration date will be annotated. If there is no expiration date on the board certification, the program will verify board certification annually for active clinical instructors. eMedley will send an automatic email to the program and the clinical instructor within 60 days from board certification expiration for an updated copy to be

uploaded in eMedley as long as the health care professional remains an active clinical instructor for the UNC-CH MHSPAS Program.

Clinical instructors at UNC Medical Center and UNCPN, the credentialing office will monitor specialty certification and notify the Director of Clinical Education if the clinical instructor is no longer credentialed at UNC Medical Center or UNCPN as stated on letter of memorandum from the respective credentialing office.

- **Clinical Site/Clinical Instructor Continuous Monitoring:** Once the clinical site is approved, formal site visit occurs for all active clinical sites at least every 2 years by the UNC-CH MHSPAS Clinical Affairs Team or sooner if there are concerns from the program or students regarding the clinical site and/or clinical instructor. Documentation includes assessment of the clinical site, focusing on any significant changes of/within the facility since prior evaluation, safety, security, patient diversity. All information is documented on the Continuous Clinical Site/Clinical Instructor Evaluation form and key information is updated on the clinical sites page in eMedley.

Continued clinical site evaluation of all active clinical sites occurs on an on-going basis through review of SCPE First Week Check-In survey and Student Evaluation of Clinical Instructor/Clinical Site Evaluation Form.

- **Faculty Appointment:** All active clinical instructional faculty who takes UNC-CH MHSPAS students on a continuous basis will hold non-salaried fixed-term Adjunct Faculty appointment, in the Department of Allied Health Sciences, School of Medicine. Clinical instructors holding adjunct faculty position will be onboarded with UNC Chapel Hill Human Resources and undergo a criminal background check. Each fixed term faculty member is expected to exhibit excellence in one of five areas: clinical activity, teaching, research, administration, community professional service. Excellence in more than one area is considered exceptional.

All adjunct faculty will undergo promotion review in the same cycle as regular faculty, with the same deadline for submission of the Chair's recommendation to the Dean. Adjunct faculty will be evaluated for promotion based on the quality and significance of the contribution they make to the area(s) described in their individual dossiers.

PUBLISHED

- UNC PA Program Policies and Procedures web page: <https://www.med.unc.edu/ahs/unc-pa/students/policies-procedures/>
- UNC PA Program Student Handbook

HISTORY OF APPROVAL AND UPDATES

Initially approved by Program Director, December 14, 2020. Updated, April 1, 2022.