



Workforce Management Center

NURSING Clinical Placement Program

www.alamohealth.org

OPERATING GUIDELINES Policies and Procedure

MISSION

Identify barriers to clinical placement of nursing students in San Antonio hospitals and utilize an electronic clinical placement tracking system.

Address modification of clinical education and develop a preceptor model of clinical education by incorporating the concept of a “dedicated educational nursing unit”.

Enhance the pipeline for nursing faculty by identifying and incorporating one or more specific faculty enhancement models.

STATEMENT OF PURPOSE

The Workforce Management Center will facilitate the development and implementation of an interactive web-based system for use related to nursing student clinical placement in the greater San Antonio region www.alamohealth.org. The purpose of the system will be to track and coordinate both actual and potential placements in order to maximize current placements; explore new and alternate placement opportunities; support expanded school of nursing enrollments; and to better prepare students for the realities of current practice while ensuring the previous and new relationships between the clinical agencies and schools are maintained.

The purpose of these guidelines is to provide written standards for all participants related to the use of the clinical placement program and to outline procedures for data entry and the process for obtaining clinical placements.

To ensure collaboration within the program between clinical agencies and the schools of nursing, the South Texas Acts for Nursing Development (S.T.A.N.D.) Oversight Committee has been established to guide the work of the program. Each partner has representation to allow for all participants to have close cooperation and shared specific rights and responsibilities. The committee is a union of common purposes where all parties benefit from the synergies of cooperation and the outcomes of success. The affiliation is defined as a “**working relationship**” characterized by mutual participation, joint interest, and mutual respect. The South Texas Acts for Nursing Development (S.T.A.N.D.) Oversight Committee has been organized to:

- develop and implement a regional clinical placement technology process that facilitates and expands clinical placement opportunities
- implement “sub-committees/taskforces” as deemed necessary by a consensus of the members of the South Texas Acts for Nursing Development (S.T.A.N.D.) Oversight Committee
- develop and implement policies and operational procedures allied to the system
- conduct evaluation of the program using the clinical placement technology system
- foster dialogue between Clinical and Education partners to problem-solve clinical and educational issues and to resolve placement conflicts and to facilitate collaboration and continued discussion among faculty of schools and departments of nursing and clinical agencies about issues related to clinical placement and practice
- develop mechanisms to evaluate adequacy and quality of clinical placements
- maintain open lines of communication and goals consistent with Workforce Management Center
- encourage the development of new relationships/affiliations and sharing creative approaches to student experiences
- develop partner links as a means of better communication between partners and students
- create better processes for the orientation and clinical requirements for students
- support staff nurses and students through the acceptance and enhancement of innovative models for clinical experiences
- explore programs that would contribute to the development of staff nurses in their roles as preceptors and educators
- expand and improve our software system, StudentMAX®, to promote a user-friendly product
- evaluate the benefits of the clinical placement technology system to the Greater San Antonio region

MEMBERSHIP

Membership is voluntary and open to schools of nursing and clinical agencies of the Greater San Antonio region that are in keeping with the purpose and function of the committee.

Membership of Workforce Management Center includes a representative from participating clinical and education facilities throughout the region, the Program Director, Clinical Placement Coordinator, Administrative Coordinator, members of the South Texas Acts for Nursing Development (S.T.A.N.D.) Oversight Committee as appointed by the Nurse Leadership Forum.

Members commit to working collaboratively, providing timely response to requests and feedback/input, following the Operating Guidelines and Procedures of Workforce Management Center, actively participating on Committees, and attending monthly meetings.

Clinical and Education facilities can be represented by more than one member; however, one member is designated as the primary contact.

Guests and non-members wishing to attend are asked to notify the Workforce Management Center Program Director in advance of the meeting.

Partners must sign a Nursing Clinical Placement Affiliation Agreement.

Each designated representative is provided password protected access to the StudentMAX® system for the purpose of requesting/scheduling clinical placements, communication, common interests and facilitating the distribution of documents, forms, user manuals, meeting minutes and agendas and any other documents deemed appropriate for posting.

MEETINGS

Meetings are held on a periodic basis as determined by the membership.

Whenever possible, future meetings are scheduled in advance and listed in the agenda. A meeting reminder with a call for agenda items will be sent prior to the meeting date. Agenda for the meetings is distributed via email.

The Workforce Management Center Program Director or designee may call special meetings or choose to have members email decisions instead of calling a special meeting.

Decisions are made by consensus of the members. Members unable to attend a meeting may register their opinion by emailing the Administrative Coordinator. When a clinical or education facility is represented by more than one individual, it is expected that the members will present one opinion.

Meeting minutes, agendas and any pertinent documents associated with the meeting will be posted in the documents section within StudentMAX® (“shared documents” are not private, “documents” access is password protected).

DUTIES AND RESPONSIBILITIES

Program Director/Clinical Placement Coordinator:

- serve as lead for the Workforce Management Center Nursing Clinical Placement Program in conjunction with the Greater San Antonio Healthcare Foundation, Nurse Leadership Forum, and South Texas Acts for Nursing Development (S.T.A.N.D.) Committee
- coordinate development and maintenance of Policies and Operating Procedures
- liaison with education partners and clinical facilities to maximize clinical placements and facilitate communication
- support the members in their efforts to achieve the goals of the committee
- conduct monthly meetings and negotiate situations as needed to maximize our effectiveness and relationships
- develop relationships with new clinical facilities for potential placements

- maintain fiscal and administrative responsibility and accountability for Workforce Management Center and StudentMAX®
- ensure that licenses and contracts are reviewed and meet our business needs
- coordinate efforts for expansion and sustainment
- communicate program information to Stakeholders
- coordinate development of subcommittees as needed
- lead in the development and maintenance of the Website

Administrative Coordinator/Clinical Placement Coordinator:

- coordinate data collection for evaluation process
- participate in teleconferences and meetings with StudentMAX® Users
- coordinate clinical placements
- update the database with approved entries; post new procedures, meetings, forms to the website, etc.
- ensure that agendas and minutes are posted in a timely fashion
- assist partners with the development of Partner links
- orient new members to Workforce Management Center and StudentMAX®
- work with the StudentMAX® Program Director to enhance the functionality and resolve problems with StudentMAX® for Workforce Management Center members and clients
- attend and participate in meetings
- prepare and distribute meeting notices, agendas, take minutes as directed by the Program Director
- provide technical support and communicate with StudentMAX® staff as needed
- participate in the development and maintenance of the Website

The South Texas Acts for Nursing Development (S.T.A.N.D.) OVERSIGHT COMMITTEE

Membership and Expectations

- Members of the committee should consist of a balanced representation of Education Partners and Clinical Partners.
- New members are assigned to the committee based on the needs of the whole and interest of the new member.
- The committee meets as needed to accomplish goals in a timely manner with meeting times determined by committee members, Program Director, and Clinical Placement Coordinator.
- Active participation and attendance is expected.
- The committee members will contribute to the development and maintenance of the Website.
- Committee members will review and update the Operating Procedures.

- Committee members will support the development of new affiliations within the community for clinical placement opportunities.
- Committee members will develop a fee structure with the Workforce Management Center.
- Committee members will establish and maintain standards that govern student participation in clinical placements.
- Committee members should appoint a “committee lead” who will:
 - determine agendas with input from committee members and program staff, providing updates to various affiliates
 - support committee members in decision-making, reviewing progress, reporting, in writing (frequency TBD)

Potential Sub-Committees

- Subcommittees are the working groups for the South Texas Acts for Nursing Development (S.T.A.N.D.) Oversight Committee. Each group will be responsible for specific duties. These sub-committees will be scheduled based on the needs and workload of the S.T.A.N.D. Oversight Committee. Each will have a facilitator that will be responsible for calling and facilitating the meetings, recording minutes and reporting updates and recommendations to the South Texas Acts for Nursing Development (S.T.A.N.D.) Oversight Committee for voting and enforcement. Committees meet as needed to accomplish goals in a timely manner with meeting times determined by committee members, Program Director, and Clinical Placement Coordinator. Some examples of sub-committees and their functionality are:

Standards Committee – this group is responsible for identifying the standard information requirements for Clinical Agencies and Schools of Nursing. Members will develop recommendations to provide standardization to the clinical placement process and assist with streamlining the work of placements.

The Operating Guidelines Committees’ duties may include:

Review concerns that are brought forward by the South Texas Acts for Nursing Development (S.T.A.N.D.) Oversight Committee. Committee members will delegate the investigation of concerns about processes or procedures that are brought forward from the community or partners to the “Operating Guidelines Subcommittee”. Upon receipt of the report from the subcommittee, resolution of these concerns will occur with a majority vote of committee members.

The Community Partners Committees’ duties may include:

Members will serve as an outreach arm of the South Texas Acts for Nursing Development (S.T.A.N.D.) Oversight Committee. Along with the Program Director, fosters the development of new affiliations within the community for clinical placement opportunities, develops programs for and assists with new partner orientation, develops marketing plan and materials to expedite new placement opportunities, work in collaboration with other clinical placement groups to avoid duplication of efforts.

The Evaluation Committees’ duties may include:

Along with the Program Director, members will develop an evaluation plan for Workforce Management Center and establishing protocol for evaluation, collecting and analyzing baseline and follow-up evaluation data as recommended by the committee, and reporting findings to the group and stakeholders.

The Publication Sub-Committee duties may include:

Along with the Program Director, collaborate for the purpose of publication and information dissemination related to the project.

Taskforces – additional taskforces may be added for the purpose of solution-building on a specific topic/task. All partners will be provided an opportunity to participate as they are developed.

Members will (schools/agencies) participate in **a minimum of one sub-committee.**

Sub-Committees /Taskforces will generate minutes which are forwarded to the Program Director for distribution to the entire group (via the Partner Documents) and record keeping. Partners may request copies of minutes from the Administrative Coordinator as needed by contacting

Each Sub-committee/Taskforce is responsible for reporting an update of committee work during the South Texas Acts for Nursing Development (S.T.A.N.D.) Oversight Committee meetings.

Sub-Committees/Taskforces should consist, where possible and appropriate, of equal membership from schools of nursing and clinical facilities. New members are given Sub-committee/Taskforce assignments based on committee needs and preferences of the new member.

Sub-Committee/Taskforce meeting locations and schedules will be established based on objectives and priorities of the committee.

CLINICAL PLACEMENTS

Bylaws for StudentMAX® Participation

Clinical partners have the right of first refusal

- Accounts for flexibility of units' availability/capacity
- Don't let historical issues negatively influence current placement
- Honor affiliations and past practices except if Board of Nursing's requirements for clinical experience (e.g. LVN pediatric) requires less than is presently offered

Rules of Participation:

Rules will apply to all levels of student (identify any circumstances in which different levels and disciplines of students would be an exception).

Clinical Affiliation Agreements **must** be in place with an agency **before** a school may request a placement. Schools of Nursing previously utilizing a clinical agency on a continuous basis may be given a priority in scheduling clinical placements by the agency.

All partners will submit and process requests according to a jointly developed calendar.

All changes to the website database and new requests to be added to the database **must be entered into the platform.** Each partner will obtain access to their individual organization's home page where there will be access to pending requests/changes.

Clinical placement requests both approved and not approved will be communicated to the Education Partner and the Administrative Coordinator.

Education Partner requests **must** be approved by the Clinical Partner. Without approval, changes to the website will not be made. Once approved by the Clinical Partner, these changes, deletions, additions will be entered into the database by the Administrative Coordinator and accessible on the website.

All requests for clinical sites **must** be made by the designated Education Partner. Submissions of placement opportunities are made by Clinical Partners.

All requests/corrections/changes must go through the approved school/department of nursing and the clinical agency representative. The clinical agency representative will contact the unit managers as indicated at the organization. Faculty **should not contact the units with requests**. Requests from non-designated faculty or students will not be accepted. Repeated infractions of this rule will be reviewed by the South Texas Acts for Nursing Development (S.T.A.N.D.) Oversight Committee with a determination of consequence to the partner.

Education Partner and Clinical Partner designees will carefully review database placements immediately following grid changes/additions and prior to the start of each term to clarify any concerns or conflicts with the Program Director/Clinical Placement Coordinator/clinical agency representative.

Clinical agencies will honor commitments (to the fullest extent possible) made to the schools of nursing in the negotiations process. If circumstances change or a placement is denied and the facility is unable to honor this commitment, the Clinical Partner will notify the Education Partner as soon as possible with reason for the denial and make every endeavor to accommodate the student(s) with a like clinical experience.

If a clinical agency will not be receiving students for a particular term/semester, those decisions should be made in advance of the deadlines or as soon as known.

The clinical facilities will determine when students should be allowed on the units to collect patient information, receive and deliver report (patient information exchange) or any other times students should be allowed on units.

Preceptors:

One on one contract; the days of the week and shift may vary based upon the Preceptor's schedule. Faculty must discuss with the Nurse Manager at the facility to inform of the student needs, determine if there are certain days for Preceptors.

For precepted clinical placements that already appear on the grid as approved placements, schools of nursing will notify clinical agencies with the student information approximately one month prior to the start of the rotation. It is the goal that clinical agencies will respond within two weeks with the details of the precepted experience (name of preceptor, shift hours/days of the week, etc). If the school has not heard within this time frame from the clinical agencies, schools will need to notify the specific South Texas Acts for Nursing Development (S.T.A.N.D.) Oversight Committee member for assistance.

Clinical agencies will let the schools know if student orientation requirements are beyond the normal standard requirements for precepted experiences. (The standard requirements are defined by each agency.) Create a standard preceptor agreement and assure preceptor agreements are properly executed:

- instructors cannot bring more students than were pre-approved; alternate precepted opportunities must be found
- define student to instructor ratios (state mandated)
- define student to preceptor ratios
- no more than one precepted student will be scheduled to a unit when a clinical group is scheduled at the same time; clinical groups are given priority in scheduling

Changes/Cancellations:

All partners agree that the clinical agencies should be reasonably accountable for all placements previously approved unless circumstances limit the availability of placement openings. If a situation or change within the agency will limit the experience for the students, a cancellation would be appropriate if an alternate site could not be located within the agency. If this is indicated, the agency must cancel at a minimum **of 120 days prior to the start of the clinical placement in writing** to the School of Nursing (SON) and Program Director in order for the SON to have time to find an alternate placement.

If school/department faculty attempts to arrange a placement with clinical agency staff/managers, the faculty should be referred back to their agency and school representatives. Any discussions of clinical agency placements between clinical agencies and school/department of nursing administration should include agency and school representatives. Any approved placements that occur as a result of negotiations can be sent directly to the Program Director by either the agency or school representative. Once approval for this placement is verified with the agency, the placement will be added to the platform by the Program Director / Clinical Placement Coordinator.

It is expected that Schools only request the placements they plan to use to avoid extra workload for the Clinical Agencies related to the approval process. All partners agreed that Schools are to be accountable to all placements requested and approved. If a situation or change occurs within the School that would prevent the use of the clinical placement as approved, cancellation should be done as far in advance of the placements in order to allow other Education Partners for the agency the opportunity to use the placement. Schools are to communicate if they are **releasing scheduled placements at a minimum of 30 days before the start of the clinical** if the placement cannot be used for their students.

Partners are to communicate with each other at the earliest opportunity if they have a suspicion or possibility there may be a cancellation. Cancellations should be as far in advance as possible.

Cancellations that are done 30 days or more prior to the clinical placement will result in a ***“Temporary Open/Hold”*** situation and the school will retain the history related to the placement in the future year requests.

Cancellations that occur with less than 30 days prior will result in a ***“CANCEL/OPEN”*** situation and the school will forfeit the history for the placement unless the Program Director/Clinical Placement Coordinator/ South Texas Acts for Nursing Development (S.T.A.N.D.) Oversight Committee received written approval by the agency for the school to retain their history.

All cancellations must be put in writing and submitted to the Program Director/Clinical Placement Coordinator electronically to record the date/time of the cancellation.

Any placement that is released into a Temporary or Cancelled situation may be opened for use by other schools with the approval of the clinical agency. The Program Director/Clinical Placement Coordinator will contact the agency and if OPEN – the information related to the placement will be sent to all the Education Partners for the clinical agency via email. If a School can use the placement as previously approved, they may request the placement. Once the agency approves the new school, the platform will be updated and information related to the history will be documented in the “Comments Section” for future reference.

Emergent requests/situations/issues will be resolved on a case by case basis.

Student Documentation:

Schools are expected to comply with the documentation requirements for all students, course and Clinical Instructor/Faculty prior to the start of each clinical. All requirements are to be submitted directly to the clinical agency

based on the requirements of the affiliation agreement no **later than 2 weeks or 14 days prior to the start** of the clinical. Noncompliance with this timeframe may result in loss of the clinical placement.

Background checks

- Standardize a baseline background check if possible (Nurse Leadership Forum/NLF decision).
- Consider the extra time needed for FBI check for VA and military hospitals Orientation. (allow six (6) weeks processing).
- Initiate standardized orientation if possible.
- Standardized orientation (high level – Joint Commission, OSHA, etc. requirements).
- Include equal employment opportunity wording in rules.
- Include use of student passports in rules.
- Student information re: orientation (immunizations, criminal background checks, CPR) kept on an Alpha Roster, maintained at schools; each student given a form, populated with information, to share with clinical partner, when needed (avoids HIPAA, FERPA involvement); names of students provided to clinical partners as soon as faculty member assigned to cohort.

ADMENDMENTS

The Operating Guidelines may be amended through consensus of the Workforce Management Center.

DISSOLUTION

If the functions of the Workforce Management Center are no longer needed or effective, the membership may dissolve the Workforce Management Center by consensus of the membership, provided that the dissolution was introduced at the previous meeting. In the event of dissolution, any funds remaining in the treasury will be disbursed by consensus of the membership.