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	Leadership	Date Effective:	August 14, 2024
	Policy: Observers & Shadow Opportunities	Date of Origin:	September 17, 2014
	Approved By: Medical Staff Executive Committee, Administrative Policy Council	Date Approved:	August 13, 2024

I. Purpose

The purpose of this policy is to define the parameters for observations by students, physicians, and other healthcare professionals at Connecticut Children's Medical Center, including all affiliates and subsidiaries of CCMC Corporation (Connecticut Children's).


II. Policy

It is the policy of Connecticut Children's to further its educational mission by allowing certain qualified students and professionals to undertake short-term opportunities to observe the care and services provided at Connecticut Children's, when appropriate and subject to the availability of a suitable Connecticut Children's sponsor. In consideration of patient privacy and safety, all such observations shall take place only upon approval from an appropriate Connecticut Children's sponsor and the department coordinating the visit, and in accordance with the parameters set forth below.

III. Inclusion/Exclusion Criteria/Indications/Definitions

A. Definitions

- Coordinating department is defined as the department responsible for coordinating the particular type of observer, as follows:
 - Medical student, pre-med student, and individuals observing medical clinical faculty members are coordinated through Medical Education.
 - All other student observations are coordinated through the Learning & Performance Department.
 - Observations for recruiting purposes (e.g., potential new hires) are coordinated through the Human Resources Department.
 - Observers not falling into any of the above categories are coordinated by the individual sponsor/department organizing the visit, who is responsible for ensuring compliance with the requirements of this policy.
 - Observer is defined as an individual, including but not limited to a student, physician, or other healthcare professional, who has been accepted/invited by an appropriate sponsor at Connecticut Children's for a short-term opportunity to observe the care and services provided at Connecticut Children's for purposes including, but not limited to, career exploration, degree requirements, recruiting, or observing a particular procedure.
 - Sponsor is defined as an employee of Connecticut Children's who has agreed to host an observer in accordance with this policy.
- B. Inclusion: A Connecticut Children's employee, volunteer, or student or member of the Connecticut Children's medical staff who has been invited to observe outside of their usual department is considered an observer for purposes of this policy for

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the duration of such observation.

1. Such individuals are limited to a strictly observational role like any other observer (see Section IV(A)(1)).
2. Current employees, volunteers, students, and members of the Medical Staff are exempt from the requirements of this policy that they have already met in their usual Connecticut Children's role (e.g., the documentation requirements in Section IV(C)(2) and the check-in requirements in Section IV(D)(1) and (2) if the area in which they are observing is an area to which they already have badge access).
3. Sponsors must treat such individuals as any other observer and, in particular, follow the confidentiality requirements outlined in Section IV(E).


C. Exclusions:

1. Special Visitors (e.g., entertainers/celebrities conducting a pre-arranged visit through Child & Family Support Services, individuals on a pre-arranged tour of Connecticut Children's organized by the Connecticut Children's Medical Center Foundation, Government Affairs Department, etc.) – follow Special Visitors/Tours of and Entertainment Programs for Connecticut Children's policy.
2. Students conducting a clinical or nonclinical experience that includes hands-on work/patient care, that is part of a degree program's course curriculum, and for which they are receiving academic credit – follow Student Placements policy
3. Vendors – follow applicable Connecticut Children's vendor policies
4. Clinical Research – Individuals seeking to observe visits conducted for clinical research purposes must be approved by Connecticut Children's Institutional Review Board (IRB), which follows a separate process that is not addressed in this policy.

IV. Key Points

A. General Parameters for Observations


1. Activities: All observers, regardless of professional credentials, experience, or education, are limited to a strictly observational role and may not:
 - a) Examine and/or provide treatment to a patient;
 - b) Take a patient history;
 - c) Handle or operate medical equipment;
 - d) Make recommendations regarding specific patients, provide consultations, or make decisions about patient care;
 - e) Document in the medical record or research records; or
 - f) Otherwise participate in patient care in any manner.

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2. Length: Except when longer observations/shadow opportunities are a required part of a student's degree program and the sponsor is able and willing to accommodate a longer shadow opportunity, the maximum total period of time for which an observer may conduct an observation at Connecticut Children's is seven (7) days. This maximum is cumulative (i.e., an observer wishing to observe in multiple departments may be at Connecticut Children's for a total of seven (7) days, not seven (7) days per department/sponsor.) The length of a specific observation is determined at the discretion of the sponsor up to the seven (7) day maximum. Such prolonged experiences may require additional documentation and/or background or health checks, as determined by the Director of Risk Management, Infection Control, Learning & Performance, Human Resources, Medical Staff Office, and/or the sponsoring department, as applicable.
3. Age: Observers must be at least sixteen (16) years of age to be eligible for an observation opportunity at Connecticut Children's. Observers under the age of eighteen (18) may not observe in hazardous areas, including without limitation clinical areas.
4. Number of observations: Students are limited to one observation placement opportunity per student (can be in one or multiple departments as outlined above).
5. Relatives: Observers/job shadowers are not permitted to shadow a close family relative, a domestic partner or a significant other. If such a relationship develops after acceptance of the observation request either through personal circumstances or hospital/ department reorganization, the relationship must be disclosed to the coordinating department. For purposes of this policy, (1) "close family relative" includes spouse, civil union partner, child, parent, grandparent, grandchild, brother, sister, step-child, aunt, uncle, cousin, niece, nephew, legal guardian, legal ward, foster parent, foster child, parent-in-law, brother-in-law, and sister-in-law; (2) "domestic partner" means two adults who reside together in the same residence, are engaged in a committed relationship of mutual caring and support, and are jointly responsible for welfare and living expenses; (3) "significant other" refers to two adults engaged in an ongoing romantic and/or sexual relationship; and (4) "direct supervision" means the immediate supervisor and the Department Manager.

B. Evaluation and Acceptance of Observation Requests

1. Requests for observation shall be reviewed and considered on a case-by-case basis by the sponsor and/or coordinating department, as applicable. Observations are granted based on the sponsor's and Connecticut Children's ability and willingness to meet the observer's needs and in accordance with


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the parameters of this policy. There is no guarantee that an observation request can or will be accommodated.


2. The potential sponsor shall review the request (with their immediate supervisor, if appropriate) to determine whether to accept the observer.
 - a) Considerations may include, but are not limited to:
 - (1) Education - whether the individual's education/degree program/job experience are appropriate for the sponsor's specialty/department;
 - (2) For student observations, maturity and seriousness/level of interest in pursuing a career in the field;
 - (3) Purpose of the observation (meeting degree requirements, exploring a career in the field, learning about Connecticut Children's practices, etc.);
 - (4) Willingness and ability of the sponsor to be responsible for supervising the observer for the duration of their visit and ensuring the observer's compliance with this policy, including completion/collection of all appropriate documentation;
 - (5) Whether the sponsor is able to accommodate an observer in their department without compromising safety, confidentiality, or quality of care; and
 - (6) What the individual's expectations of the shadow experience are and whether the sponsor/department is able and willing to meet them.
 - (7) Consider meeting/interviewing the observer to assess the above prior to making a decision on the observation request.
 - b) Observers wishing to observe in under multiple sponsors must get approval from each individual sponsor.
 - c) If the observer is a student, coordinating department must determine whether s/he will be completing assignments related to the shadow experience, and, if so, vet for any confidentiality concerns with the Legal Department and/or Risk Management Department.
 - d) If the visit is not coordinated by Learning & Performance, Medical Education, or Human Resources, the individual sponsor accepts responsibility for ensuring and documenting that the pre-visit steps outlined below are followed.

C. Pre-Observation Procedures; Documentation Requirements


1. If applicable (i.e., if the observer is a student or new hire) the sponsor shall inform the coordinating department that they have agreed to accept the observer and the coordinating department will handle the processing of the individual's forms as described below.
2. The coordinating department or sponsor, as applicable, shall provide the observer with copies of the following documents:

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- a) Code of Conduct policy/Certification Form;
 - b) Workplace Attire policy;
 - c) Protection of Confidential Information policy, Confidentiality Agreement, and HIPAA Self-Learning Packet (Appendix C);
 - d) This policy and the accompanying Health Screening Tool (Appendix A) and Observer Acknowledgement (Appendix B)
 - e) Parental Consent Form if observer is age 16-17 (Appendix D)
 - f) Any individual scheduled to visit during flu season, as defined by Connecticut Children's, must submit proof of current COVID-19 and flu vaccination.
3. The observation may not be scheduled until all documents required per Section IV(C)(2) above have been returned to the coordinating department or sponsor, as applicable.
 - Coordinating departments/sponsors shall maintain records including the names, dates of observation, and validation of completion of screening requirements of observers coordinated through their departments and retained as indicated in Connecticut Children's Record Retention policy.
 4. Once coordinating department/sponsor has received completed forms:
 - a) Coordinating department: Provide basic pre-visit information (address, parking, etc.) and instruct observer to work directly with sponsor to schedule observation.
 - b) Sponsor:
 - (1) Work directly with observer to schedule the observation and pre-register observer with front desk;
 - (2) Inform and coordinate with other staff who may need to know about the visit, if any; and
 - (3) Provide observer with any additional pre-visit instructions specific to their department/role, if needed.
- D. Day(s) of Observation: General Requirements
1. Checking In:
 - a) Main hospital: Observer shall register at the Information Desk upon arrival and obtain an "Escorted Visitor" badge.
 - b) Satellite offices: Observer shall check in with front office staff in accordance with site's procedures for visitors.
 - c) In the event of an observation lasting multiple days, the observer must register and obtain a new badge (if applicable) each day of the observation.
 2. The sponsor or a designee shall meet the observer at the front desk.
 3. The sponsor or designee shall determine whether the observer meets Connecticut Children's health standards for visitors using the Visitor Health Screening Tool (Appendix A).

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- a) Sponsors shall not allow an observer presenting or reporting symptoms to continue with the observation. The observation may be re-scheduled at the sponsor's discretion.
 - b) The health screening (or portions thereof) will need to be completed multiple times in the event of an observation occurring over the course of multiple days/weeks, as it covers exposures within the past 24 hours and the past three (3) weeks.
 4. The observer must wear appropriate attire in accordance with the Connecticut Children's Workplace Attire policy.
 5. The observer must be accompanied by the sponsor or an appropriate designee of the sponsor at all times while on Connecticut Children's premises.
 6. Unless otherwise agreed between Connecticut Children's and the observer, all costs associated with the observation (transportation, meals, parking, etc.) shall be the responsibility of the observer.
 7. The sponsor shall immediately end the observation and direct the observer to leave the premises if the observer (i) materially violates this policy or any other Connecticut Children's policy or procedure, including without limitation a failure to respect patient confidentiality or privacy, (ii) fails to abide by the sponsor's instructions and/or the agreed-upon parameters of the observation, (iii) interferes in any way with patient care; or (iv) is in any other manner disruptive, insubordinate, or a threat to safety or confidentiality in the judgment of the sponsor.
- E. Confidentiality Requirements for Observation of Patient Care/Treatment
1. If the observer will be observing patient care or treatment:
 - a) The sponsor shall remind the observer of the following:
 - (1) Limitations of their observational role (e.g., no involvement or input into patient care)
 - (2) Importance of maintaining patient confidentiality
 - (3) The appropriate time to ask the sponsor questions (between visits or at the end of the shift, not during the visit). Observers are not to ask any questions to or provide any other feedback directly to the patient/family.
 - (4) Note-taking by the observer is permissible, but notes may not include sensitive business information, personal information, or protected health information (PHI).
 - c) Prior to the start of each patient visit, the sponsor shall introduce the observer to the patient/family. If the patient/family indicates that they are not comfortable with the observer's presence, the observer shall leave the room.

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d) Sponsors shall utilize their professional judgment when determining what visits are appropriate for potential observation.

E. Post-Observation

1. The sponsor or their designee must escort observer to the front desk area at the end of the observation (or in the case of an observation lasting multiple days, at the end of each day of observation).
2. Observers must obtain prior written approval from the sponsor, the Corporate Communications Department, and/or the Director of Health Information Management or applicable designee, as applicable, before publishing any material relating to their observation experience at Connecticut Children's.

V. References

VI. Appendices

Appendix A - Visitation Guidelines for Connecticut Children's Medical Center:
 Observer Health Screening Tool
 Appendix B - Observer Acknowledgement Form
 Appendix C - Observation/Job Shadow Parental Consent Form

VII. Related Documents

Children in the Workplace
 Code of Conduct
 Minimum Necessary Access and Disclosure
 Protection of Confidential Information
 Right to Request Amendment of Protected Health Information
 Special Visitors/Tours of and Entertainment Programs for Connecticut Children's
 Student Placements
 Volunteer Services
 Volunteer Services Parental Consent Form
 Volunteer Services Consent for Treatment Form
 Workplace Attire

APPENDIX A
Visitation Guidelines for Connecticut Children's Medical Center:
Observer Health Screening Tool
For Day of Visit

	Within the past 24 hours, have you had:	If answer is "yes," to any question, individual is not permitted to visit patient-care areas, including waiting rooms. Visit can be canceled or postponed.
<input checked="" type="radio"/>	Fever?	
<input checked="" type="radio"/>	Rash?	
<input checked="" type="radio"/>	Sneezing?	
<input checked="" type="radio"/>	Sore Throat?	
<input checked="" type="radio"/>	New or Worsening Cough?	
<input checked="" type="radio"/>	Vomiting?	
<input checked="" type="radio"/>	Diarrhea?	
	"Pink Eye"/Conjunctivitis?	
	Within the last 3 weeks, have you been exposed to:	If answer is "yes," individual is not permitted to visit patient-care areas, including waiting rooms. Visit can be canceled or postponed.
<input checked="" type="radio"/>	Chicken Pox?	
<input checked="" type="radio"/>	Tuberculosis?	
<input checked="" type="radio"/>	Measles?	
<input checked="" type="radio"/>	Mumps?	
<input checked="" type="radio"/>	any other infectious disease?	

APPENDIX B
Observer Acknowledgement Form

Name: _____
Date(s) and Times of Observation: _____
Department: _____
Sponsoring Provider/Employee: _____
Activity to Be Observed: _____
Reason for Observation: _____
If student observation, educational background (school/program/level): _____

If professional observation, home institution and state/country of licensure: _____

I have received and reviewed a copy of the Observers & Shadow Opportunities policy of Connecticut Children's Medical Center and all affiliates and subsidiaries of CCMC Corporation ("Connecticut Children's"). I acknowledge that, in my capacity as an observer, I am required to abide by the policy and am limited to a strictly observational role. Specifically, I understand that, as an observer, regardless of my professional credentials, experience, or education, I may not:

1. Examine and/or provide treatment to a patient or take a patient history;
2. Handle or operate medical equipment;
3. Make recommendations regarding specific patients, provide consultations, or make decisions about patient care;
4. Document in the medical record or research records; or
5. Otherwise participate in or advise about patient care in any manner.

Observer Signature _____
Date

Parent/Guardian Signature (if observer is under 18) _____
Date

I understand the limitations of the observer role set forth above and agree to ensure that the above-named observer abides by them. I further certify that the observer listed above has been verified as being in good standing by their school/program/home institution, if applicable, and has met all of the documentation requirements set forth in Connecticut Children's Observer & Shadow Opportunities policy.

Sponsoring Provider/Employee Signature _____
Date

APPENDIX C

Observation/Job Shadow Parental Consent Form – To Be Completed by Parent or Legal Guardian for Observers Under 18

In order for your child to complete an observational experience at Connecticut Children's Medical Center and/or Connecticut Children's Specialty Group, Inc. ("Connecticut Children's"), your consent is required. Please read and sign this Parental Consent Form if you would like to allow your child to participate in an observational experience at Connecticut Children's. Please note that your submission of this form does not guarantee that your child will be granted the opportunity to observe at Connecticut Children's.

Name of Child: _____

Date of Birth: _____

Initials:

I understand that my child named above wishes to be considered for a job shadowing or other observational experience at Connecticut Children's and I hereby give permission for my child to do so, if accepted by Connecticut Children's. I understand that being in a hospital/healthcare environment has certain inherent risks, including risk of injury and exposure to illnesses that may cause serious harm and/or death. I hereby accept those risks, for myself and on behalf of my child, and release and hold harmless Connecticut Children's, its parent company, affiliates, subsidiaries, officers, directors, employees, agents, and volunteers from any and all liabilities and claims associated with my child's participation in a job shadowing/observational experience.

I am aware that my child will be required to adhere to Connecticut Children's policies and procedures, including without limitation confidentiality policies and dress code. I understand that my child is legally prohibited from sharing the identity or any clinical details regarding patients of Connecticut Children's with anyone, including me. .

I understand that Connecticut Children's will determine, in its sole discretion, whether a particular observation request can be accommodated and is appropriate for my child. I further understand that Connecticut Children's can remove my child from the observational experience or from observing particular patients and/or procedures at any time, in its sole discretion.

I understand that my child's transportation to/from Connecticut Children's and any other expenses associated with the observational experience are solely my/my child's responsibility.

Print Name

Relationship to Observer

Signature

Date

Document Information

Document Title

Observers and Shadow Opportunities

Document Description

The purpose of this policy is to define the parameters for observations by students, physicians, and other healthcare professionals at Connecticut Children’s Medical Center, including all affiliates and subsidiaries of CCMC Corporation (Connecticut Children’s).

Approval Information

Approved On:	08/13/2024
Approved By:	Medical Staff Executive Committee and Administrative Policy Council
Approval Expires:	08/31/2027
Approval Type:	Manual Entry
Document Location:	/ Leadership
Keywords:	observer, observation, shadow, job shadow, shadowing, professional visitor, observing a procedure, student, recruiting
Printed By:	Guest User
Standard References:	N/A
Note:	This copy will expire in 24 hours