Program Coordinator Forum

Academic Affairs

Presented to: NMHC Program Coordinators
Presented on: February 24, 2020
Presented by: NM Academic Affairs
Today’s Discussion

Topics

• A Conversation with Julie Creamer, MS, RN
  President, Northwestern Memorial Hospital
  President, Marianjoy Rehabilitation Hospital
  Senior Vice President, Northwestern Memorial HealthCare

• Overview: Our Accomplishments and Our Academic Affairs Team

• 5 Things to Know
  1. Resident Concerns
  2. Observer Process
  3. Electives and West Region Rotations
  4. CLER
  5. House staff link on NMI

• 2020-21 Onboarding, Orientation, and Corporate Health Clearance
  Katelyn Dean, RN, BSN, Resource Coordinator Nurse, Corporate Health
  Cheryl Bailey, Client Services Coordinator, Corporate Health
Welcome Julie Creamer

Julie L. Creamer, MS, RN

- President, Northwestern Memorial Hospital
- President, Marianjoy Rehabilitation Hospital
- Senior Vice President, Northwestern Memorial HealthCare
OUR Accomplishments

- Onboarded **313** residents and fellows last July
- Launched **Delnor Family Medicine** residency
- **5 base hospitals** – NMH, Delnor, Lake Forest, Marianjoy, and McHenry
- Relationships with **2 academic partners**
- There are **690 NM residents in 26 programs**
- 254 fellows in **79 Fellowships, 46 ACGME-accredited**
- 26% of the NMHC medical staff were Northwestern/McGaw trainees; **42%** at NMH
- 72 NMHC Coordinators
- Invested **$180,000** in new Blue Scrubs Machine at NMH
- Moved NMH **house staff gym** to a **new, larger space** in Prentice, 9th floor
- **100%** flu shot compliance
- **1,400** sandwiches and **40 hours of chair massages** provided at **4 NMH Wellness Events**
Academic Affairs: Who We Are

Academic Affairs is responsible for supporting the resident and fellow experience at NM.

Christine Bonomo, Director
- Financial and Strategic Management
- GMEC Member
- Collaboration with NM and McGaw Leadership
- Policy and Procedure Oversight
- Integration

Allison Kane, GME Manager
- Core Program Finance
- Infrastructure Management
- Regulatory coordination
- Internal Communications/House Staff Liaison
- Orientation Coordination

Susan Heiniger, GME Coordinator
- Legal Agreements
- Incoming Rotations
- Day-To-Day Operations
- House Staff Wellness Programming
- NMI Site Content and Social Media

Mia Reed, Psychiatry GME Coordinator
- Full time GME Program Coordinator for Department of Psychiatry
- NMH Clinical Observation requests, process, and approval
- Resource for Outside Medical Education Requests
1. Resident Concerns

**Personal Safety and NM Security**
- Dial 2-2222 from any house phone
- Dial 1-855-667-2332 from an outside line
- Emergency Notification System in place

**NETS Reporting: Fear of Retribution & Process Uncertainty**
- Not intended for retribution; intended for organizational learning
- What type of information should go in a NETS report?
- What makes a NETS report useful and actionable?
- Contact Risk Management to schedule time for your program to review their resources or to run a mock RCA (Root Cause Analysis)

**Differences among Base Hospitals and Programs**
- Availability of different amenities
- Differences in what programs fund
- Input into how funds are spent

More information available in appendix, pages 18-29
2. Observer Process

- Obtain the observer packet from NMI or email Mia Reed at mccollin@nm.org.
- Applicant completes entire packet and all signatures must be obtained before approval is granted.
- NO International Medical Students.
- Observer works directly with Department/Division Education Coordinator.
- Maximum of 5 days Observation
  - Two weeks with Chair approval
  - Department of Medicine requests approved by Dr. Didwania. The DoM: Department policy can be obtained through Dr. Didwania’s office
  - NMH Policy on Observers can be found on NMI

More information available in appendix, pages 30-34
3. Electives and Rotations in the West Region

West Region is Central DuPage Hospital (CDH), Delnor Hospital, and RMG clinics

Required Forms

- Rotation Establishment form (approval needed only once – PD and Host must sign)
- Program Letter of Agreement (PD and host site Director must sign)
- Goals and Objectives
- Supervision Policy
- Individual Rotation form (required for every individual and every rotation)

Use correct PLA for each location – site Chief Medical Officer’s signature required

All forms are available on the Program Coordinators’ section of NMI

IMPORTANT: Academic Affairs will obtain signatures from the DIO, Academic Affairs Director, and Chief Medical Officer – please do not contact them directly

More information available in appendix, pages 35-40
4. Clinical Learning Environment Review (CLER)
NMH is expecting its fourth CLER Visit. Here’s how you can help!

**Six Focus Areas**
- Patient Safety
- Healthcare Quality
- Care Transitions
- Supervision
- Professionalism
- Well-being

**Visit Structure**
- Three Days
- Senior Leadership
- Group meetings (PDs and House staff)
- Walking rounds

**Preparation Part I**
(before notification)
- Supervision Templates
- Focus Area Presentations
- Tour Guides

**Preparation Part II**
- Two-week notice
- Peer-selected groups
- PD and Faculty
- Re-send reference Materials

**PC Support**
- Communications
- Schedules
- Information Sessions
5. House Staff Website
Visit our website frequently and navigate NMI’s wealth of resources.

- NMHC News & Policy Updates
  - Latest announcements on NM updates affecting House Staff
  - House Staff Hub
  - Epic Updates

- Grand Rounds

- FAQs

- Updated Coordinator Resource Features

- NMI Features and Resources
Orientation and Onboarding

- Onboarding Timeline
- Orientation Day Schedule
- Communications
- Epic test-out training for Fellows
- August 1st and Off-Cycle Starts

More information available in appendix, pages 41-42
2020-2021 Onboarding and Orientation

Communication Timeline and Deadlines

- March 24, 2020: Welcome to Northwestern Medicine: Save-the-Date!
- Date TBD: Taxonomy code, IMPACT, and PECOS Checklist
- June 1, 2020: NM Online Training and Usernames e-mailed
- June 23, 2020: Orientation Day
- June 19, 2020: Orientation Day Schedules e-mailed
- June 1, 2020: Drug Screening completed
- April 22, 2020: NPI Application due
- April 17, 2020: Corporate Health records due

Academic Affairs

Trainee
**Orientation Day Draft Schedule**

<table>
<thead>
<tr>
<th>Time</th>
<th>Group 1</th>
<th>Group 2</th>
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<tbody>
<tr>
<td>6:30am</td>
<td>Registration and Breakfast</td>
<td>Welcome from Leadership</td>
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<tr>
<td>7am</td>
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<td>7:30am</td>
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<tr>
<td>9am</td>
<td><strong>Break-Out Groups</strong></td>
<td><strong>Elective Information Sessions</strong></td>
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<td>Pager Distribution</td>
<td>Risk Management</td>
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<td>E&amp;Y Payroll/Benefits</td>
<td>Pavilion Tour</td>
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<td>McGaw Staff</td>
<td>Resident Panel</td>
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<td></td>
<td>Lab Coat Fitting</td>
<td>Clinical Documentation</td>
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<td>ID Badges</td>
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<td>Scrub Registration</td>
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<td>IMPACT and PECOS Enrollment</td>
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<td><strong>Epic Training and IT Walk-Up Desk</strong></td>
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<td><strong>Lunch</strong></td>
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<td><strong>Epic Training and IT Walk-Up Desk</strong></td>
<td><strong>Elective Information Sessions</strong></td>
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Activities and times subject to change. Have ideas for Elective Information sessions? Email academicaffairs@nm.org!
Corporate Health Screenings

Katelyn Dean, BSN, RN, Resource Coordinator Nurse, Corporate Health
Cheryl Bailey, Client Services Coordinator, Corporate Health

Contact information: Katelyn Dean, kpenneba@nm.org/312.926.1972; Cheryl Bailey, cbailey1@nm.org/312.926.8503
Onboarding - Corporate Health Updates

GOAL: Medical Clearances prior to June 23 and July 1 Start Dates.

- All medical records, immunizations, and forms due **April 17, 2020**
  - *Exception-2\textsuperscript{nd} TB tests may be submitted after this deadline*

### Immunization and Medical Records

- TB Screening Requirements
- Urine Drug Screen order sent out once paperwork is received and MUST be completed by June 1st
- Other Immunity: Mumps/Measles/Rubella, Varicella, Hepatitis B, and Pertussis (Tdap)
- Northwestern Medicine will not cover the costs of missing immunizations or TB tests

### Appointments available after April 1

- N95 Respirator fit test
- TB and other testing will **NOT** be performed by NMG Corporate Health
- Records **MUST** be submitted 5 days prior to appointment
- Limited appointments on Orientation Day
THANK YOU!
We appreciate your many contributions.
Appendix

- Resident Concerns: Personal Safety and NM Security (Pages 18-25)
- Resident Concerns: Risk Management and Event Reporting (Pages 26-29)
- NMH Clinical Observers (Pages 30-34)
- Incoming Visiting Residents and Fellows (Pages 35-40)
- Medicaid IMPACT (Pages 41-42)
Personal Safety and NM Security
Security Services Contact Information

• Dial 2-2222 from any in-house NMH phone

• 1-855-667-2332 toll free option
  – 1-855-NMSAFE2

• [NMI Security Services Site](#) (no login required)
Recent Safety & Security Initiatives

• NM Security has collaborated closely with campus partners including NU, Lurie, and Shirley Ryan to improve security officer presence and patrols.
  – NMH has added officer patrol points, as indicated in red on page 22.
  – Cameras have been added to NMH building exteriors and interiors, such as elevators and staff access points.
  – Emergency blue light stations that route to NMH Security are indicated by the orange triangle. NU Emergency blue light stations are indicated by the purple circles. The security dispatch team receiving the alarm will notify the other to collaborate and determine the best intervention and escalation.
• If you witness an incident or suspicious behavior on campus, contact Security, activate one of the blue lights, a duress or panic button if one is located on your unit, or dial 911.
NM Security has offered to expand escort services from the parking garage to apartment buildings located inside the red lines in which residents live.
- Security requests a minimum of 20 minutes’ notice.
- When considering a request, please be mindful of other Securities priorities which may take precedence.
- The escort service is to be used for your personal safety, e.g., extreme fatigue that may affect awareness or an uncomfortable patient encounter.

See next page for a larger version of the map.
Reminders to remain self-aware—

• Be aware of your surroundings and avoid sending text messages or talking on the phone while walking.
• When dark outside, walk in well-lit areas, and if you can, walk with someone or in groups.
• Keep valuables out of sight.
• If you choose to wear headphones, keep the volume at a reasonable level to maintain awareness.
• Do not wear bags or purses across your body. When an attempt is made to grab the bag or purse, you might go down with it.
Services offered by Security

• Unlock/lock requests
  – Security is available to open or secure doors 24/7, including granting access to vendors doing work during off hours.

• Security patrols
  – Should a security-related situation arise in your area that calls for a heightened security presence, extra patrols and well-being checks can be requested.

• Visitor restrictions
  – Should an inpatient request a visitor restriction, contact your local Security office for assistance with the restriction process.

• Lost and found
  – Your local Security office can tell you where to locate/claim misplaced property. Patrol officers are available to take reports of missing property from staff, patients and visitors.

• Active Shooter Prevention and Response Training (click here for all available resources)
Safe Central Campus Parking options for Overnight Call

• Parking B (attached to the Lavin Pavilion)
• Proxy Card
  – $11 cost per park automatically charged to provided NM cost center
  – Users must enter after 2:30pm and leave by 9:30 am
  – $6 replacement fee for lost proxy cards
• Daily Passes
  – Discounted rate of $16 for up to 16 hours
  – No entry time restriction
  – Obtain a voucher from the valet office with a valid NM ID badge
Risk Management and Event Reporting
Partnering with Risk Management: Reporting Patient Safety Events

Reporting safety events is not punitive or a form of punishment. Here’s why reporting safety events to Risk matters.

- Identify opportunities to develop and implement actions that improve patient care such as *Root Cause Analysis* to problem solve collaboratively and effectively.

- Timely identification and reporting of near-miss or adverse events leads to decreased serious safety events that cause harm, serious harm, or death.

- Help you provide *thoughtful disclosure* to the patient/family prior to discharge.

- Protect findings of an adverse event investigation – do not discuss an event or its PHI via non-encrypted text messages or emails.

- Collaboration with Patient Safety, Process Improvement, and clinical stakeholders at the system-level to prevent recurrence and mitigate patient harm.
Best Practices on Submitting a NETS Report

- Keep the report brief and factual as it is discoverable, meaning it can be subpoenaed and used in a claim or lawsuit.
- Only include information that can be found in the patient’s medical record.
- If you are unsure what to place in the report or have details that shouldn’t be included in a summary, call or page for assistance.
- NETS report feedback will be provided by selecting the box indicating feedback is requested, and may be limited due to sensitivity of the topic.

To file a report, submit via NETS online, call the Risk Hotline at 6-7475, or page the 24/7 Risk Pager at 5-7475.
Risk Management SSE (Serious Safety Event) Process Flow

Event classified by the CCEC (Clinical Classification and Evaluation Committee)

Event shared during local daily safety huddle within 5 days of classification

RCA process initiated, action plan developed

Action plan approved by President, CNE, CMO during PSOC within 45 days of classification

Action items completed timely

Action plan closed by hospital President, CNE, CMO

Event summary and action plan submitted to PSO within 1 year of classification
### Key Clinical Observer Definitions

For NMH Inpatient and NMG Clinics, observations roles are important.

<table>
<thead>
<tr>
<th><strong>Host</strong></th>
<th><strong>Clinical Observer</strong></th>
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| • The individual who acts as a sponsor to the Clinical Observer and is responsible for the Clinical Observer’s conduct.  
• Only NMH/NMG attending physicians, NMH directors, and NMG clinical managers may host a Clinical Observer.  
• Medical students, residents, and fellows may not be hosts to observers.  
• The Host is responsible for obtaining required approvals for the Clinical Observer.  
• The Host, or his or her delegate, must accompany the Clinical Observer at all times in clinical areas. | • A visitor to NMH who will be watching patient care functions for medical or professional education, training, or other NMH approved purposes.  
• A Clinical Observer may not participate in any patient care activities nor have any direct / indirect contact with patients. |
Clinical Observation Requests

There are several considerations for Central campus observers.

- Obtain the observer packet from [NMI](http://www.feinberg.northwestern.edu/education/visiting-students/) or email Mia Reed at [mccollin@nm.org](mailto:mccollin@nm.org). Applicant must complete the entire packet and all signatures must be obtained before approval is granted.

- NO International Medical Students

- Domestic and International Student Requests: [http://www.feinberg.northwestern.edu/education/visiting-students/](http://www.feinberg.northwestern.edu/education/visiting-students/)

- Observer works directly with Department/Division Education Coordinator. Observer should not contact Mia directly.

- Maximum of 5 days Observation
  - Two weeks with Chair approval
  - Department of Medicine requests approved by Dr. Didwania. The DoM: Department policy can be obtained through Dr. Didwania’s office
  - NMH Policy on Observers can be found on [NMI](http://www.feinberg.northwestern.edu/education/visiting-students/)
Clinical Observation Requests

There is an additional step for observers requesting surgery observation time.

- Completed applications for observation in the OR must be directed first to Samantha Crawford-samantha.crawford2@nm.org

  - Worawan (Dow) Liwanag, MSN, RN, CNOR - Director, Nursing, Surgical Services, approves before Academic Affairs

  - Samantha will forward signed applications to Mia
Research Requests and Medical Student Inquiries

You may receive inquiries from students, post-doctoral trainees, and physicians outside of NM about research opportunities. Please direct them to any of these avenues.

- Research Fellowships
- Visiting Scholars
- Use of EDW Data for Research
- Volunteer Opportunities – NUCATS
Incoming Visiting Residents and Fellows
Applications for Visiting Rotations at NMH
There are two types of incoming rotations: Elective and Standing.

**Elective Rotation**
- 90 day deadline
- One-time rotation
- Must fill out a program rationale in order to be approved
- Visitors CANNOT oversee or overlap with med students or other house staff
- Must be initiated by Northwestern faculty—not application without a faculty invitation
- Signatures from programmatic, departmental, and institutional leadership

**Standing Rotation**
- 30 day deadline
- Pre-established agreement that reoccurs over a set period of time, e.g., 1 new rotator every month
- Built into sending program’s curriculum

**Pro Tip**
Always pull applications from NMI for the most up to date forms
Applications for Visiting Rotations at NMH

Rotations have several requirements.

Both Rotations Require:

- A Master Affiliation Agreement (template found on NMI) is a legal agreement between institutions
- A Program Letter of Agreement (template also found on NMI) is an agreement between programs
- Background forms from applicant and applicant’s program director
- Attestation to FSM Safe and Healthy Learning Environment Policy
- Signed NMH Confidentiality Agreement
- Illinois State Medical License
- Health screen requirements fulfilled
- Government-issued photo ID
Elective Rotation Application and Onboarding Process

**Program**
- NMH Physician invites applicant to rotate at NMH.
- Pull elective application form from NMI and email to applicant’s PC for applicant to complete.
- Review submitted application for completion. If complete, submit to Susan Heiniger. If incomplete, obtain outstanding items from applicant’s PC.
- Submit Part One of application. Due 90 days prior to start.
- Submit Part Two of application. Due 30 days prior to start date.

**Academic Affairs**
- Obtain ACMO and McGaw approval. Once approved, Susan will provide direction as to next steps re: legal agreements.
- Complete onboarding process to ensure rotator has necessary access.*
- Obtain ACMO and McGaw approval. Once approved, Susan will provide direction as to next steps re: legal agreements.
- Complete onboarding process to ensure rotator has necessary access.*
- Up to a week prior to rotation start, AA will email both you and the applicant their Epic login and instructions for obtaining a badge and scrubs.

***During onboarding Academic Affairs:**
1. Enters visitors into HR system (PeopleSoft)
2. Requests visitors’ Epic Access
3. Provides NM usernames and logins
4. Provides instructions for ScrubEx registration
5. Approves ScrubEx registration
6. Submits Sentact badge requests

Rotation Begins!
Standing Rotation Application and Onboarding Process

Program

Pull standing rotation application form from NMI and email to applicant’s PC for applicant to complete.

Review submitted application for completion. If complete, submit to Susan Heiniger. If incomplete, obtain outstanding items from applicant’s PC.

Submit application. Due 30 days prior to start date.

Academic Affairs

Complete onboarding process to ensure all rotator necessary access.*

Up to a week prior to rotation start, AA will email both you and the applicant their Epic login and instructions for obtaining a badge and scrubs.

*During onboarding Academic Affairs:
1. Enters visitors into HR system (PeopleSoft)
2. Requests visitors’ Epic Access
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4. Provides instructions for ScrubEx registration
5. Approves ScrubEx registration
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Rotation Resources on NMI

Rotations and Observers

Incoming Rotation Applications
- Elective Rotation Checklist  (last updated: 11.20.18)
- Elective Rotation Application  (last updated: 05.08.19)
- Standing Rotation Checklist  (last updated: 04.17.18)
- Standing Rotation Application  (last updated: 05.08.19)
- Clinical Observation Application  (last updated 10.19.18)

Incoming Agreement Templates
- Incoming Rotation GME Master Affiliation Agreement Template
- Incoming Rotation Program Letter of Agreement Template

Non-Base NMHC Rotations
The below 5 items are required in order for residents and fellows based within NMHC to rotate at another NMHC location:
1. Rotation Establishment Form  (rotation approval required only once)
2. Program Letter of Agreement (PLA)
   - PLA for Central DuPage Hospital (CDH) Rotations
   - PLA for Delnor Hospital  Rotations
   - PLA for All Other Locations  Rotations
3. Goals and Objectives
Medicaid-IMPACT
House Staff Prescribing Issues—Recommendations
IMPACT Enrollment – Issues and Recommendations

Now that IMPACT is enforcing the enrollment requirement, some house staff are being told they’re not enrolled or need to re-enroll.

Common Issues

• Renewed license after application submitted
• Changed from temporary to permanent license
• Application not fully submitted

Recommended Strategies to Solve – Contact IMPACT

• IMPACT Hotline: 1-877-782-5565
• IMPACT Help E-mail: impact.help@Illinois.gov
• IMPACT Login Hotline: 1-888-618-8078
• IMPACT Login E-mail: impact.login@Illinois.gov

Recommended Strategies to Solve – Log in to your IMPACT account (page numbers reference the Medicaid Enrollment Instructions)

• Log in: https://impact.illinois.gov/eai/ILPlogin/authenticate?URL=/uisecure/ILPselfservice/
• Click IMPACT (page 45)
• Click Track Application (page 46)
• Enter Application ID, then verify your social, DOB, and zip code (page 47)
• Review steps (pages 25-38)