

Practice Education Guidelines for BC Placement Process

GL#1-1

Practice Guideline

March 17, 2007

Practice education is a collaborative partnership between the Receiving and Placing Agencies that considers the needs of patients, students and staff. Support for practice education is essential in order to address current and future health human resource needs.

Well-defined processes must be in place for responding to student placement requests in order to provide consistency, fairness, and equity for all students.

Guideline Details

Priority Categories for considering placement requests:

First: Accredited public post-secondary institutions within local geographic area (first) and within BC (second)

Accredited private post-secondary institutions by the Private Career Training Institutions Agency (PCTIA) whose programs are approved by the respective licensing bodies and are within local geographic area (first), within BC (second)

Accredited private post-secondary institutions who provide a provincially recognized curriculum and are within local geographic area (first), within BC (second)

Second: Accredited public post-secondary educational institutions within Canada

Third: Accredited public secondary educational institutions (School Districts) providing post-secondary education within the Receiving Agency jurisdiction (first) and within the local geographic area (second)

Fourth: Other accredited (first) or registered (second) private post-secondary institutions within BC (by PCTIA), and who provide references on the quality outcomes of the program

Fifth: Other post-secondary educational institutions outside Canada (i.e. USA, UK, Asia)

General Placement Process Steps:

1. All placement requests should be submitted:
 - as a formal request and should originate from the Placing Agency coordinator/designate making the request.
 - at least 1 month in advance of the desired start date. If discipline or program-specific deadlines for submission exist, those must be followed.
 - with information regarding:
 - The number of students
 - Types of students
 - Type of experience required
 - Dates and times of the required experience
 - Expectations of staff with respect to student supervision and evaluation
 - Program information including course goals and outlines (for new programs/institutions)

2. Assess request based on Priority Category.
3. Determine whether there is an existing educational affiliation agreement and that the agreement covers the requested educational program.
 - a) If yes, then proceed with processing placement.
 - b) If no, proceed through contract management process.
4. Ensure student/faculty has met placement requirements (refer to respective [Practice Education Guideline](#)):
 - Criminal Records Search
 - Immunizations
 - Respiratory Protection
 - Orientation
 - Confidentiality
 - Identification

For Specific Placement Processes, see:

APPENDIX A: Categories of Placements

APPENDIX B: Unique Discipline Specific Processes

Contract Management Process for Long Term Affiliation Agreements:

1. Initial Basic Screening Inquiry:
 - Does the Placing Agency hold third party liability insurance for the student while in the Receiving Agency of not less than \$5 million (CAD)? (Any amount less than this must be approved by the Receiving Agency insurer)
 - Does the Placing Agency hold **WorkSafeBC** coverage for the student **OR Personal Injury Insurance** of \$500,000 or more? (A Risk Assessment should be conducted when this requirement is not met.)
 - Does the Placing Agency meet all Receiving Agency placement requirements?

If the answer is "No" to any of these questions, determine whether or not it is in the Receiving Agency's interest to proceed with the request since anomalies take time and effort to work out. Patient and organizational risk must be kept to the minimum.

2. Request detailed course outlines, objectives and program descriptions for review.
3. Receiving Agency issues the Educational Affiliation Agreement Standard Template for review and signature when:
 - the school/program meets current clinical standards of practice
 - the students and on site faculty meet Receiving Agency pre-placement requirements
 - the placement location is willing to accept the placement request (see Decision-Making Factors)

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4. Requests to alter contract language must be negotiated between Placing and Receiving Agency legal counsel and/or insurer. Track any variations to standard contract language.
5. The authorized individual (authorized signatory*) in the Placing Agency signs the agreement then returns it to Receiving Agency for signing by their authorized individual (authorized signatory*).
6. Once an agreement has been signed by all parties:
 - Ensure that all agreements are centrally filed in the Receiving Agency.
 - Provide a copy of the signed agreement to all signatories.
 - Update the Receiving Agency list of current agreements.
7. Annually review which Educational Institutional Agreements are up for renewal.
8. Initiate proceedings for renewal of agreements that are due to expire.
9. Keep all agreements and related placement forms and documents (i.e. Confidentiality Acknowledgement, Consent form, Orientation Checklist) on file for a period of seven years.

For contract processes related to 'one of' or short term contracts, see:

APPENDIX A: Categories of Placements

Decision-Making Factors:

Decisions to accept, decline, or terminate practice education placements should be made using a fair and equitable decision-making process.

Factors that may influence decision-making:

- a. Staffing levels.
- b. Workload - both the individual and work site/program area has the ability to support the student(s).
- c. Appropriateness of placement request with work practice.
- d. Degree of faculty supervision, availability, and faculty/student ratio.
- e. Preparation and clinical competency of the faculty in the practice area requested and in relation to the level of the group instructing (i.e., novice vs. advanced).
- f. Staff have the ability to support a student in the given practice area and at the student's level of practice.
- g. Staff/student ratios are appropriate for the practice area and student level.

Placement issues during the term of the contract:

If there are concerns regarding the program or the faculty, a letter outlining the issues/concerns must be sent to the Placing Agency (Program Head, Director and/or Dean). Once there is evidence that the concerns have been satisfactorily addressed, the Receiving Agency should reconsider the request. (refer to [Practice Education Guideline – Practice Education Relationship](#))

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Conversely, if there are concerns about the standard of care or service in the Receiving Agency, a letter outlining the issues/concerns must be sent to the manager of the location. The letter should be copied to the administrator responsible. It could also be copied to the discipline practice lead and the practice education lead.

Any issues or concerns that arise while a current agreement is in place and are not satisfactorily resolved may result in the termination of the agreement by either party according to the terms outlined in the agreement.

Placing or Receiving Agencies may appeal cancellation of an agreement through a written request for review.

Roles & Responsibilities

Placing agency:

- Ensure an affiliation agreement is in place.
- Comply with all aspects of the affiliation agreement.
- Comply with the various placement processes within the Receiving Agency and profession.
- Ensure that faculty understands the terms of the affiliation agreement.
- Designate a primary contact to arrange and conduct communication between the Placing Agency and the Receiving Agency.
- Ensure all requests are:
 - timely (enough time to process request and for student/faculty to meet all requirements of placement)
 - appropriate to student learning needs
 - limited to the number of placements required (not asking for more than needed)
- Ensure all aspects of the practice education relationship are maintained. (refer to [Practice Education Guideline – Practice Education Relationship](#))

Receiving Agency:

- Designate a primary contact to arrange and conduct communication between the Receiving Agency and the Placing Agency.
- Use a fair and equitable decision-making process.
- Respond to requests in a reasonable timeframe (enough time for Placing Agency to arrange for orientation of faculty prior to start or seek another location should request be declined).
- Consult with Placing Agency programs before imposing placement requirements that may impact the quality of the learning experience and learning outcomes.

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- If a destination is not able to receive previously accepted placements (due to closure, communicable disease outbreak, or staffing as examples), work with the Placing Agency to locate suitable alternative placements when needed.
- Include practice education in strategic planning at all levels including human resource, systems, and infrastructure.
- Consider impact to practice education when planning and implementing major change (i.e. staffing, construction, relocation).
- Ensure all aspects of the practice education relationship are maintained. (refer to [Practice Education Guideline – Practice Education Relationship](#))

Consequences of Non-compliance

All parties are put at risk when there is no educational contract in place.

If Receiving Agencies do not participate in the practice education of students, it can negatively impact the learning outcomes of the student, thus the future health human resources needs of the Receiving Agencies.

Rationale or Background

Students enrolled in health professional education programs in BC should have educational practice placements of the quality necessary to meet the course objectives of their program/course thus meet health human resource needs of the future. Educational programs have a contractual responsibility to students to provide a quality practice education experience in or for students to successfully complete their program.

A fair and equitable placement process allows decisions to be consistent and transparent for all parties when faced with numerous requests. Receiving Agencies in a defined geographic area should maintain priority access for students from geographically and historically aligned Placing Agencies. Other Placing Agencies requests should be considered only after all local requests are accommodated.¹

“Health authorities have final responsibility for patient and staff safety and for the quality of care they provide. They are being asked to accommodate an increasing number of students at a time of increasing pressure on their health service capacity. Timing, volume, and type of placement impact on their ability to accommodate the placement requests. They need to be assured of appropriate standards of quality for educational programs and individual students. Health Authorities need to be involved in planning and coordinating across sites and across disciplines and have the final say on placements within their organizations, based on a valid and fair decision making process.”²

¹ BC Academic Health Council (July 8, 2004). *Practice Education Survey Final Report: Planning for Sufficient & Appropriate Student Placements for Health Professional Students in BC*. Vancouver, BC. Page 33.

² Ibid, Page 33.

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“In accepting applicants to education programs, institutions commit to a quality experience based on planned student placement opportunities. Unanticipated changes to placement availability or demand, especially on short notice, usually result in negative resource or quality impacts. Educational institutions should receive early warning of changes in health care delivery that may lead to student placement capacity changes. Health Authorities and other organizations hosting students should receive early warning about anticipated changes in the demand for student placements.”³

A contract management process is essential to the practice education relationship. It ensures that all parties meet legal and liability requirements and that risk to organizations and individuals is kept to a minimum.

The aspect of ‘timeliness’ in the placement process is important from both sides. Placing Agencies need to give Receiving Agencies enough notice of request in order to allow sufficient time to process the request, especially when an agreement needs to be instituted (it can take up to 3 months to negotiate an educational agreement). Receiving Agencies need to respond to requests in enough time to allow faculty/students time to orientate to the location or allow the Placing Agency time to locate another placement if needed.

Definitions

Authorized Signatory: individual in the organization who is designated to sign legally binding contracts. Senior Administration and Finance usually identify these individuals. Front line managers are not usually authorized to sign off on contracts such as Educational Affiliation Agreements.

Supervised Practice: A time-limited placement arrangement where the individual requires supervised practice in order to fulfill admission to or continued licensure by a professional college.

Professional Development: knowledge and skills required for maintaining a specific career path or to keep current with changing technology and practices in a profession.

References

BC Academic Health Council (July 8, 2004). Practice Education Survey Final Report: Planning for Sufficient & Appropriate Student Placements for Health Professional Students in BC. Vancouver, BC. Page 33-34. Retrieved on Dec 18th, 2006 from [http://www.bcahc.ca/BCAHC_Placement_Survey_Final_Report.pdf]

Interior Health Authority. (February 2006). Administrative Policy Manual - AU1000 Student Placements (Clinical & Practice Education). Kelowna, BC.

Learning & Career Development. (February 2006) Student Practice Education Policy and Procedure DRAFT. Vancouver Coastal Health Authority, Vancouver, BC.

³Ibid, Page 33-34.

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Private Career Training Institutions Agency (of BC) (2006). Information Guide. Burnaby, BC.
Retrieved on January 14, 2007 from [www.pctia.bc.ca]

Questions for discussion

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APPENDIX A Categories of Placements

1. National *Take Our Kids to Work*TM for Grade 9 students

[<http://www.takeourkidstowork.ca/>]

Some areas of practice are not appropriate for this experience. Receiving Agencies should have guidelines in place that help determine appropriateness. The goal is to protect the privacy of patients/clients, maintain confidentiality, and keep all involved safe.

- **This program is not a BC Ministry of Education sponsored event or a School District activity.** There is no third party liability coverage or WorkSafeBC coverage by the Ministry of Education or School District for this experience. The Receiving Agency is not responsible for any loss, injury, or damage, including property loss or damage, which the child/charge may suffer as a result of his/her participation in the program.
- Due to liability and risk issues, the student should be the child or legal charge of the employee/physician.
- Parents/legal guardians should apply to the Receiving Agency site manager for the visit and sign a form that acknowledges parental/guardian responsibility for the experience. Parents/legal guardians must accept total responsibility for the supervision and safety of the child/charge.
- The operations manager of the Department/Unit/Program must authorize the experience, retain a record of the visit and provide a copy of signed documents to the parent/legal guardian.
- This is strictly an Observational Experience due to liability issues as well as the nature of work. The child/charge must under direct supervision of the parent/guardian at all times.
- Confidentiality Acknowledgement should be co-signed by parent/legal guardian because student is under legal age.

2. High School students in time-limited 'work experience' programs

“Work experience is defined in legislation as ‘that part of an educational program that provides a student with an opportunity to participate in, observe or learn about the performance of tasks and responsibilities related to an occupation or career.’”⁴

- Request must be related to the Career Preparation/Coop Education curriculum only and must be school-arranged and teacher-monitored.
- Student must be age 16 Yrs or older (Grade 11/12).
- Student must be selected by their teacher for demonstrated maturity and clearly defined career goals, with declared interest in a health care related profession.

⁴ Ministry of Education (March 2005). *Program Guide for Ministry Authorized Work Experience Courses*. British Columbia. P. 1

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- Student must have a parent/guardian accessible throughout the experience.
- Student, parent, school supervisor, and manager/designate sign a *Work Experience Placement Agreement* or its equivalent in wording and intent.
[http://www.bced.gov.bc.ca/careers/work_experience.pdf] Appendix B: Page 27.
- Students attending public schools in school-arranged and teacher-monitored experiences are covered for both third party liability and WorkSafeBC.⁵ For more details on this type of placement, please refer to the Ministry of Education Work Experience web sites:
[<http://www.bced.gov.bc.ca/careers/weinfo.htm>]
[http://www.bced.gov.bc.ca/policy/policies/work_experience_req.htm]
- Students attending private schools must have equivalent monitoring and coverage to those students from public schools.
- Confidentiality Acknowledgement should be co-signed by parent/legal guardian because student is under legal age.
- Usually, this is strictly an Observational Experience due to liability issues as well as the nature of work in health care.
 - If there is a 'hands on' component to the experience, the student must never be asked to perform any task unless such task might reasonably be expected to be within the scope of the student's training and abilities.
- If the request is for observation/job shadow either because of a school assignment or due to career interest AND it is **not** school-arranged and teacher-monitored:
 - Do not accept the request because the student is not covered under school liability or accident insurance.
 - If appropriate, arrange alternative (e.g. health professional guest speaker, tour).

3. Request for Career Exploration/Observation Experience

- **Adult Non-professional;**
- **Visiting Professionals** (out of jurisdiction); or
- **Pending Professionals** (awaiting professional registration in BC)

Some areas of practice are not appropriate for this experience. Receiving Agencies should have guidelines in place that help determine appropriateness. The goal is to protect the privacy of patients/clients, maintain confidentiality, and keep all involved safe. Location managers/designates need to assess degree of risk.

- **Strictly observational** – no provision of care or service to the client is permitted.
- The individual is not required to belong to a health profession.
- The individual must be 19 years of age or older.

⁵ Ministry of Education (March 2005). *Program Guide for Ministry Authorized Work Experience Courses*. British Columbia. P. 5

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- May require liability insurance and personal injury coverage. Receiving Agency should have some type of form that addresses the experience and whether or not they have the required coverage.

4. Professional – No Agency Affiliation (Professional Development* or Supervised Practice*)

- Experiences must be relevant to the individual's field of practice.
- Individual must have temporary or regular professional registration within BC including malpractice insurance (\$5 mill).
- Must provide proof of registration, malpractice insurance, and Criminal Records Check (if not included in registration process)
- Experiences may be either observational or experiential.
- The Receiving Agency staff must not ask the individual to perform any task unless such task might reasonably be expected to be within the scope of the individual's training and abilities.
- If providing direct care:
 - Must be under the supervision of Receiving Agency staff.
 - Only provide care that is within scope of training and abilities and within the policies of the Receiving Agency.
 - Is subject to professional practice standards and guidelines.
- Because the individual would not hold WorkSafeBC coverage, **Personal Injury Insurance** is strongly recommended and is the responsibility of the individual.

If no **Personal Injury Insurance** coverage is obtained, a risk assessment should be conducted by the Receiving Agency and determine if the risk of injury is such that the requirement can be waived. If it can, then the individual should be informed of the degree of risk and asked to sign an acknowledgement and release of responsibility for any injury or damage suffered during the placement. If the Receiving Agency determines that the requirement cannot be waived due to the risk, the Receiving Agency may choose to decline the placement or accept the risk for the individual.

5. Professional – Agency Sponsored (Professional Development*)

- Experience must be sponsored by the Placing Agency thus assumes the responsibility for liability and personal injury coverage.
- Receiving and Placing Agency must have an agreement in place (for example: an affiliation agreement or interagency agreement).
- Experiences may be either observational or experiential.

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- If providing direct care:
 - Must be under the supervision of Receiving Agency staff.
 - Only provide care that is within scope of training and abilities and within the policies of the Receiving Agency.
 - Is subject to professional practice standards and guidelines.

6. Out-of-Province Undergraduate/Graduate Studies

- The placement should not be confirmed until all the appropriate documentation is completed.
- Some provinces do not provide any workers' compensation (accidental injury/disability) coverage for students at all. Others only provide coverage when the student has their practice education experience in the same province as where the school is based. The only province that has an external provider of insurance for out-of-province placements is ONTARIO (as of 2006) and one only need ask for proof.
- If the student does not have **Personal Injury Insurance** (accidental injury/disability) coverage, the Placing Agency and/or student must assume the responsibility for obtaining personal coverage (recommend \$500,000 minimum). The student should also obtain extended health coverage but be informed that this will not necessarily cover any work-related incidents or injuries.

If no **Personal Injury Insurance** coverage is obtained, a risk assessment should be conducted by the Receiving Agency and determine if the risk of injury is such that the requirement can be waived. If it can, then the student should be informed of the degree of risk and asked to sign an acknowledgement and release of responsibility for any injury or damage suffered during the placement. If the Receiving Agency determines that the requirement cannot be waived due to the risk, the Receiving Agency may choose to decline the placement or accept the risk for the student.

- Placing Agency must provide curriculum overview, course description, and letter of recommendation regarding the level of student competency and ability to practice while being supervised at a distance.
- Placing Agency must provide a clear plan for how remote supervision will occur and what the process will be should any issues/concerns arise.
- Proof of a Recent Criminal Record Check from the home province.
- Proof of Immunizations.
- Students are responsible for providing their own accommodation and transportation.

7. International Undergraduate/Graduate Studies

The process for placing international students is not simple and placement should never be confirmed until all requirements are met.

- Student must check with Citizenship and Immigration Canada [<http://www.cic.gc.ca/english/study/index.html>] or nearest Canadian Consulate as to what is required for visas, permits, medical assessments, and length of stay and provide proof of same.
- Malpractice/liability insurance coverage must be in Canadian currency (\$5 million CAD).
 - Some Placing Agencies do not/will not provide any malpractice/liability coverage for their students. It is the Placing Agency's responsibility to advise and assist the student in obtaining such insurance. Proof of such insurance should be on record with the agreement.
- Proof of student registration in BC, if registration is available to international students. This may or may not include malpractice/liability insurance coverage. If it does not, then the student must hold malpractice/liability insurance coverage through the Placing Agency or from an insurance provider. (See Contract Management Process).
- Proof of travel health insurance in addition to basic health insurance; understanding that neither provides disability coverage should an injury occur during the clinical placement. The student may be able to purchase **Personal Injury Insurance** (recommend \$500,000 minimum). If not, then follow guidelines for Out-of-Province Undergraduate/Graduate Studies placements (#6).
- Proof of a Recent Criminal Record Check from the home country (in English).
- Proof of up-to-date Immunizations (in English).
- Students are responsible for providing their own accommodation and transportation.
- Placing Agency must provide curriculum overview, course description, and letter of recommendation regarding the level of student competency and ability to practice while being supervised at a distance.
- Placing Agency must provide a clear plan for how remote supervision will occur and what the process will be should any issues/concerns arise.

APPENDIX A Unique Discipline Specific Processes

1. Medical Students/Residents

Do not consider medical student/resident placement requests directly. All requests must go through the Faculty of Medicine at the University of British Columbia (UBC). Direct inquiries to the following:

Undergraduate: [http://www.med.ubc.ca/education/md_programs/md_ugrad/clerkship_electives.htm]

Postgraduate: [http://www.med.ubc.ca/education/grad_programs/md_postgrad.htm]

Note - Canadian medical students must be licensed in the province of BC and are required to have malpractice insurance provided by their university. A criminal record check is required as part of the licensing process. International students will only be granted temporary registration by the College of Physicians and Surgeons of British Columbia when the students are in their final year and from the accredited medical schools in Canada and the United States, or the unaccredited but approved medical schools in Great Britain, Ireland, Australia, New Zealand and South Africa. Students who do not attend a medical school in one of the above noted countries are not eligible to apply for a clinical clerkship in British Columbia. Unlicensed medical students can have no clinical patient contact whatsoever.

2. International Undergraduate Nursing Students

Do not accept nursing students from outside of Canada who wish a direct care experience unless they are associated with or student of a local (Canadian) school of nursing. Only nursing students from Canadian schools of nursing are allowed to, as per regulatory body bylaws, use the title "student nurse". This then restricts their ability to practice and document as a student nurse in the clinical setting. International Nursing student placements must be strictly observational if placed at all.

3. Nurse Practitioner Students

a. BC Programs

- Proceed with request
- Preceptor either physician or nurse practitioner
- Determine how supervision from the program will occur.
- Identify process for dealing with competency issues or practice concerns.

CRNBC registrant in a BC program has school liability insurance coverage. In addition, the school provides the physician supervising the student with general liability insurance through a separate letter of agreement⁶. The physician/school agreement provides general liability (including medical malpractice) insurance coverage for the supervising physician while they are conducting their work with NP students for the duration of the placement and thus is covered under the school's liability.

⁶ Nurse Practitioner Liability Insurance: Q&A. (March 2005). Registered Nurses Association of BC, Vancouver, BC

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b. Out-of-Province Programs

- Determine if the NP student is a CRNBC registrant.
- If not, refer NP student to CRNBC.
- If CRNBC registrant, determine capacity and suitability.
- Preceptor either physician or nurse practitioner.
- Determine how supervision from the program will occur.
- Identify process for dealing with competency issues or practice concerns.

Decision-Making Factors:

- Are there NP students in BC programs still needing placements? (BC students first, others second)
- Is the NP student a Receiving Agency employee?
- Is the placement important for recruitment/retention?
- Does the Receiving Agency have an existing educational affiliation agreement that includes the program and includes the required minimum third party liability coverage?

Suggest that the NP student or program coordinator contact CRNBC to inquire about competencies for registered NPs within BC. Currently, equivalency does not exist between programs across Canada (as of 2006). CRNBC may or may not recognize out-of-province/country program for registration within BC on graduation. CRNBC assesses applicants and programs on an individual basis.

If the NP student is placed with a physician who has privileges or is staff within the Receiving Agency, no additional contract between the physician and the Placing Agency need be signed. Canadian Medical Protective Association (CMPA), under the physician's general liability insurance, covers the supervision of NP students. When an NP student is placed within a physician's private practice, the Placing Agency should establish a separate affiliation agreement with that physician.

4. Physical Therapy Students - Out-of-Province and International

Direct all requests to the Academic Coordinator for Clinical Education in the School of Rehabilitation at UBC.

UBC priority placement process:

1. UBC students
2. Students from other Canadian programs
3. International students (Only those students coming from University-based programs and whose educational programs are similar to the Canadian Standard will be considered)

All students must be registered with the College of Physical Therapists of BC. Registration process includes providing proof that they are students in good standing, obtaining a criminal record check, and obtaining the required amount of liability insurance (\$5 mill/occurrence).

UBC provides the student with the application package.

If there is a space for an international student, UBC ensures that the student is at the appropriate level for the type of placement requested. Once UBC has determined the appropriateness of the student, the request is forwarded to a destination to accept or decline.

UBC involvement ceases at the point of destination acceptance. On acceptance of the request, the final organizing shifts to the Receiving Agency. ([See Categories of Placement Processes - International Undergraduate/Graduate Studies](#))

The placement is not confirmed and the clinical placement cannot begin until:

- the application is approved by the College of Physical Therapists of BC.
- an affiliation agreement is negotiated and signed off between the Receiving and Placing Agency.
- the student has met all Receiving Agency placement requirements.

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