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Owner Nancy Turner

Document ECU Health

Area Education

Applicability ECU Health
System-Wide

Shadowing, VH–HIP25

Applicability

This policy applies to East Carolina Endoscopy Center, HealthAccess, The Outer Banks Hospital, ECU Health Beaufort Hospital-A Campus of ECU Health Medical Center, ECU Health Bertie Hospital, ECU Health Chowan Hospital, ECU Health Duplin Hospital, ECU Health Edgecombe Hospital, ECU Health Health Corporate, ECU Health Medical Center, ECU Health Medical Group, ECU Health North Hospital, ECU Health Roanoke-Chowan Hospital, and ECU Health SurgiCenter.

Policy

ECU Health entities support observational experiences for individuals for various purposes including exposure to health careers and opportunities. This type of observation will be referred to as "Shadowing". Shadowing is defined as a health service delivery observational experience by an individual that is short in duration (not to exceed three consecutive weeks) and is not being used to meet the requirements of an approved or organizational program such as those under student practicum/ internship status. The purpose of this policy is to:

- Provide guidance to individuals requesting to observe (no hands on) ECU Health staff.
- Ensure the confidentiality of health information is maintained.
- Ensure patients and family are not exposed to communicable disease.
- Ensure the observer does not provide any patient care.

Relevant Forms

- Shadow Process (attached)
- Shadow Agreement (attached)

- Non Team Member Immunization Checklist (attached)

Scope

The scope of this policy applies to individuals who meet the above description of a shadow participant. This policy does not apply to patients, family members or friends visiting or accompanying patients, nor to medical staff residency rotations.

- For assistance with approved residency rotations, contact the entity's Graduate Medical Education (GME) Office.
- For assistance with non-approved medical staff rotations or shadowing of attending or Advanced License Personnel, contact the entity's Medical Staff Support Office.

Procedure

1. Contact the appropriate ECU Health entity to determine if the specific shadowing experience can be accommodated:
 - **Medical Staff and Credentialed provider** (MD, PA and APP's) shadow requests at ECU Health Medical Center are managed under the Medical Staff Support Policy and Procedure. For policy, process and forms, call **252-847-4534**.
 - **ECU Health Beaufort** - A Campus of ECU Health Medical Center: **252-975-4291**
 - **ECU Health Bertie**: **252-482-6401** or **252-482-6873**
 - **ECU Health Chowan**: **252-482-6401** or **252-482-6873**
 - **ECU Health Duplin**: **910-296-2917**
 - **ECU Health Edgecombe**: **252-641-7489** or **252-641-7743**
 - **ECU Health Medical Center, ECU Health SurgiCenter, ECU Health Home Health and Hospice, and ECU Health Wellness**: **252-847-1773** or **252-847-3174**
 - **ECU Health Medical Group**: email VMGeducation@vidanthealth.com
 - **ECU Health North**: **252-535-8125**
 - **ECU Health Roanoke-Chowan**: **252-209-3162**
 - **The Outer Banks Hospital**: **252-449-5688**

If the shadow experience can be accommodated, the contact person from the appropriate entity will refer the person making the request to the ECU Health website www.ecuhealth.org to access, complete and submit the required forms (or provide forms to complete and submit).

1. All shadow participants must read the Shadow Policy. If any part of the policy is unclear, the person requesting the shadow experience should contact the person they are working with to arrange the Shadow Experience to obtain clarification.
2. All shadow participants must complete the Shadow Agreement.
3. Non-Team member shadow participants of ECU Health are required to complete the following education modules:
 - HIPAA & Compliance

- Infection Control - Safe Practices
- Infection Control - Bloodborne Pathogens and Tuberculosis
- Safety Culture

Printed certificates that include the full name of the person requesting the shadow experience will be required as proof of review and completion of the above modules.

4. Non-Team member shadow participants of ECU Health will be required to complete the Immunization Checklist and attach a copy of their Immunization Records as proof of vaccination. All required immunizations must be received and up to date to be approved for the shadow experience. The following immunizations are required by ECU Health:
 - Full series COVID vaccination
 - Current season Flu vaccination
 - Full series Varicella vaccination or positive titer
 - Full series MMR or Individual Rubella, Rubeola, Mumps or positive titers
 - Current Tdap vaccination
 - Completion of TB Screening Questionnaire
5. All completed paperwork should be sent to the entity contact where the shadow experience is being requested per the shadow process.
6. The shadowing experience will be reviewed, approved and scheduled based on departmental availability.
7. Completed shadow paperwork for non-employees of ECU Health includes:
 - Shadow Agreement
 - Education module certificates of completion
 - Non-Team member Immunization Checklist with attached immunization records.
8. Completed shadow paperwork for ECU Health Team members includes:
 - Shadow Agreement

Each entity will keep the completed paperwork on file for a period of 10 years for all ECU Health shadowing experiences.

Shadow Participant's Responsibilities

- Prior to beginning the shadowing experience, the shadow participant must complete all required paperwork based on current employment status with ECU Health
- A shadow participant must be free of any communicable diseases or infections, have had no recent exposures to a communicable disease, and have no open or draining wounds.
- To abide by all Conduct Expectations
- A shadow participant is prohibited from discussing confidential patient information with anyone other than the person(s) they are job shadowing or their supervising team member/ medical staff team member. A shadow participant is prohibited from disclosing Protected

Health Information (PHI).

- To not provide any direct patient care. Shadow participants may not touch the patient, verbally participate in patient instruction or manipulate any equipment used in patient care.

Shadowing Supervisor/Mentor Responsibilities

- The shadow participant's supervising team member/mentor shall agree to minimize the amount of PHI to which the shadow participant is exposed.
- If the shadow participant will be in contact with individual patients, observing or remotely viewing patient care during their visit, the person designated to supervise the participant must offer each patient, or the patient's legal representative, an opportunity to agree or object to the presence of the shadow participant. Consent is sought without the shadow participant present so that patient and/or family is given every opportunity to refuse.
- Agreement must be documented in the patient's medical record. For example, the patient's agreement to the shadowing participant's presence could be documented as *"Consent obtained to having shadow participant present"*.
- The supervising team member will request permission in advance from the patient and/or family for the shadow participant to be present during patient care. If family refuses for the shadow participant to be present the supervisor/mentor will need to place shadow participant with another staff member or in an area conducive for the shadow to wait until the supervisor/mentor can continue the shadow experience.
- In situations where the patient may be unable to provide consent, shadowing should not occur (i.e., where the patient is unconscious, etc.)
- Provide an environment of learning.
- Assure shadow participant is in compliance with shadow participant's responsibilities. If not, request the termination of the Shadow Experience and contact the person responsible for setting up the shadow participant to discuss any needed follow up.

General Safeguards

- The shadow participant shall not partake in any direct clinical care.
- The shadow participant may not perform any task that would normally be performed by a healthcare worker.
- The shadow participant shall not be allowed in any suspected or confirmed COVID positive patient room/unit.
- Observation/shadowing shall be prohibited in Behavioral Health units. Exceptions may be made in Behavioral Health with written administrator approval, signed consents from patients or patients' authorized decision makers, and written explanation on the Shadow Agreement.
- Under no condition is the shadow participant to be provided with copies of any PHI or materials containing PHI.
- No pictures, screen shots or sharing of any picture, or information is to be done with social media
- Cell phones should not be used during the hours of direct shadowing experience, but may be

used on a break.

Pre-requisite Guidelines

- All shadow requests are subject to review, approval and will be based on the department's ability to accommodate the request. Request can be denied.
- Incomplete requests can be denied.
- If a shadow participant is deemed to be out of compliance with any of the rules and regulations for the shadow experience they can be asked to leave the campus immediately.
- Terms of shadowing are for no more than three consecutive weeks
- Any student seeking educational credit will be excluded and redirected to the appropriate department.
- Any team member who shadows outside of their employment job duties/obligations is under this policy and is on unpaid time off. Team members should not be requested to (nor should) provide any services to patients while shadowing.
- "ALL" Shadow participants are asked "not" to wear scrubs unless environment mandates them to be worn (i.e. sterile scrubs provided). Please view shadow agreement for dress code.

Attachments

[1 - Shadow Process for Non Team Members](#)

[2 - Shadow Process for ECU Health Team Members](#)

[3 - Facility Contacts for Job Shadowing](#)

[4 - Shadow Agreement](#)

[5 - Immunization Checklist](#)

Approval Signatures

Step Description	Approver	Date
Legal Review	Vicki Haddock: VP, Office of Gen Counsel	07/2022
Chief Human Resources Officer	Charlene Wilson: Chief Human Resources Officer	07/2022
Education	Mark Dunn: Chief Div,Inclu,Talent Mgt Off	06/2022

Legal Review 1

Becky Davis: Coord, VH Policy
Management

06/2022

Policy Owner

Nancy Turner: Program
Coordinator

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