

UF HEALTH SHANDS CORE POLICY AND PROCEDURE

POLICY NUMBER: CP03.058
CATEGORY: Confidentiality /
Information Security

TITLE: Patient Care Observers

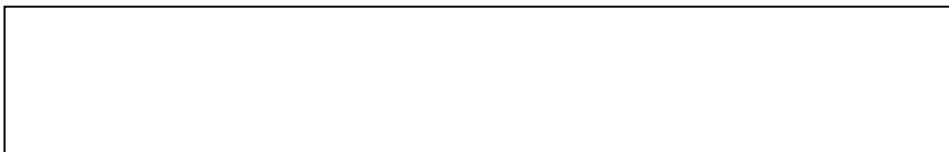
POLICY: It is the policy of UF Health Shands to recognize that appropriate observation by Patient Care Observers is an integral part of the UF Health Shands mission of creating an environment that supports education and research in the health sciences.

The Sponsoring Department shall ensure that the Observer completes and submits required forms.

The Sponsoring Department shall ask each Observer a set of health screening questions, as detailed on the Request to Observe Patient Care and Health Screening Request form, immediately prior to the start of the observation experience.

PURPOSE: To establish a process for individuals requesting to observe patient care.

APPROVED:



Edward Jimenez
Chief Executive Officer

DEFINITIONS:

- A. **Patient Care Observer (Observer)** – Is a temporary, unpaid person who wishes to observe a UF Health Shands or University of Florida employee, credentialed or contracted staff member rendering patient care for purposes of enhancing their knowledge of the provision of health care. This definition of Patient Care Observer does **not** include the following categories of persons: vendors, volunteers, interns, externs, students in an approved affiliated health education program or persons participating in a hospital tour that does not include direct observation of patient care; thus, this policy does not apply to those individuals.
- B. **Sponsoring Department** – The department or unit that hosts an Observer and assumes full responsibility for the conduct and observation status of the Observer.

CORE PROCEDURE:

I. Observer Requirements

- A. Register through the Sponsoring Department and follow applicable Patient Care Observer guidelines.
- B. Sign a UF Health Shands Security & Confidentiality Agreement ([PS127045](#)).
- C. Complete a Patient Care Observation and Health Screening Request form ([PS107249](#)).
- D. Complete HIPAA Training for Patient Care Observers in **myTraining**.
- E. Observers may not take photographs, video or digital recordings of patients.
- F. Observers are required to adhere to proper dress code while observing patient care.
- G. Behavior by Observers at UF Health Shands that is considered by UF Health Shands to be disrespectful, disruptive, intrusive, or violates any term or condition of this Core Policy or any policy established by the Sponsoring Department will not be tolerated. Any such action will result in termination of observation status and other actions as UF Health Shands deems appropriate.

II. Sponsoring Department Requirements

- A. Make an independent decision as to whether a patient care observation request, for purposes of enhancing the Observer's knowledge of the provision of health care, is appropriate.
- B. Establish terms and conditions considered necessary or beneficial to healthcare operations, generally, or applicable for any particular patient care observation event. Terms and conditions may include, but are not limited to:
 - 1. Protecting the privacy of patients/clients and their health information
 - 2. Ensuring the safety of the patient and the Patient Care Observer
 - 3. Limiting the possibility of contamination

4. Ensuring the efficiency of healthcare operations

- C. Obtain a signed UF Health Shands Security & Confidentiality Agreement from the Observer.
- D. Obtain a signed Patient Care Observation and Health Screening Request Form from the Observer.
- E. Ask the Observer the Health Screening questions just prior to (the day of or the day before) the start of the observation event per Infection Prevention and Control.
 - 1. Observers are also required to sign the Health Screening section of the request form.
 - 2. Observers exhibiting any of the signs and symptoms listed on the form (e.g., fever, rash, etc.) are not permitted to observe patient care.
 - 3. Observers that have not received a seasonal influenza vaccination (i.e., “flu shot”) may be required to use protective measures such as, but not limited to, procedure or surgical masks as outlined in HR Policy 604.
- F. Obtain proof of HIPAA training completion from the Observer.
- G. Submit all documents to the UF Health Shands Privacy Office and retain a copy within the department.

III. General Observation Requirements

- A. Observers may observe the care and services outlined in a completed Patient Care Observation and Health Screening Request form.
- B. Observers may only be scheduled for a maximum of 30 days) per calendar year.
- C. UF Health Shands reserves the right to limit or exclude Observers based on health, safety, or other operational concerns or attending physician orders.
- D. Observers must be 18 years of age or older. See exception in Section IV below.

IV. Minimum Age Exception

- A. Persons under the age of 18 who wish to observe patient care must obtain advance written approval from the UF Health Shands Privacy Office.
- B. The Sponsoring Department of a Patient Care Observer under the age of 18 will facilitate securing advance written approval.
- C. Approved Observers under the age of 18 must have their parent or legal guardian sign all required forms.

V. Patient Consent

- A. Patients shall be given the opportunity to consent to being observed through one or more of the following methods:

1. Asking the patient if he/she may be observed and documenting the patient's consent in the patient's health record, or
 2. Securing a signed Informed Consent for surgery that contains an observation provision.
- B. Whenever possible, patients shall be made aware that an Observer is present. This may be accomplished by introducing the Observer to the patient, by stating that Observers are shadowing along with the patient's care team, or by other similar means.

KEY WORDS: Shadowing, HIPAA, Privacy, Observation, Consent