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1. GENERAL

This policy provides clarification and information regarding the preceptor recruitment and renewal process in the Undergraduate Medical Education program. The preceptor will act as a facilitator and resource person to the medical student during the clinical learning experiences and will participate in the evaluation of the student's learning.

2. DEFINITIONS

Clinical Teaching Faculty (Preceptor) are fully qualified and credentialed physicians who have a clinical adjunct faculty appointment through SHSU and provide clinical instruction and supervision to SHSU medical students within an affiliated hospital or other medical facility during the 3rd and 4th-year clerkships. A preceptor is not only a teacher, but also an observer, mentor, and evaluator.

3. FACULTY APPOINTMENT PROCESS

In accordance with the mission, this policy is developed to provide preceptors with a method to obtain an appointment. SHSU-COM will document the qualifications and skills of our preceptors and provide the educational support and development essential to the delivery of a quality curriculum. Preceptors that demonstrate an interest in training SHSU-COM student doctors are reviewed for eligibility and granted an appointment with the title, Clinical Assistant Professor. This process includes the following:

- 3.1. The physician that is under consideration as a preceptor provides a completed Clinical Faculty Request Form to the Office of Clinical Education.
- 3.2. The Office of Clinical Education verifies the following: Medical License, Board Actions, and Board Certification.
- 3.3. The Clinical Education Credentialing Coordinator prepares a completed application packet for review by the SHSU-COM Faculty Evaluation and Selection Committee (FESC).
- 3.4. The SHSU-COM Faculty Evaluation and Selection Committee (FESC) will review the physician's file and recommend approval or denial of credentialing. This recommendation will be submitted to the Dean for final approval.
- 3.5. The approved preceptor will be appointed as (Volunteer) Adjunct Clinical Assistant Professor, unless otherwise approved by the Dean.
- 3.6. The new preceptor will receive a Welcome Letter and SHSU-COM certificate.
- 3.7. The credentialing coordinator will
  - 3.7.1. enter the preceptor's information into *Watermark*,
  - 3.7.2. secure an SHSU email address for the preceptor,
  - 3.7.3. arrange for preceptor access to SHSU library services,
  - 3.7.4. provide the preceptor with instructions for access to SHSU software products and services.
- 3.8. The professional development coordinator will be notified each time a new preceptor has been processed to review training materials, the Preceptor Handbook, provide training on the student

evaluation process, preceptor roles, and responsibilities.

- 3.9. Once a preceptor has been approved by the Faculty Evaluation and Selection Committee (FESC) review the applicant's information. Preceptors receive the following benefits:

- 3.9.1. Access to the SHSU library

- 3.9.2. Subscription to UpToDate®

- 3.9.3. Subscription to Prescriber's Letter

- 3.9.4. Access to *The Teaching Physician* from the Society of Teachers of Family Medicine (STFM)

- 3.9.5. Formal letter and certificate confirming the rank awarded and dates of the appointment.

- 3.9.6. CME credits for teaching medical students. CME Credits for attending faculty development sessions.

#### 4. PRECEPTOR'S SUPERVISION OF STUDENTS

Patient safety and quality of care are the primary priorities. Supervising physicians are to be engaged and retain responsibility for all aspects of patient care. The supervising physician should have privileges to perform the duties or tasks that are to be performed by the student. It is of utmost importance that preceptors acknowledge that the student must be supervised as SHSU medical students are *unlicensed*.

#### 5. PRECEPTOR RESPONSIBILITIES

- 5.1. Maintain professional license and board certification (*if applicable*).

- 5.2. Continue appointment with SHSU.

- 5.3. Supervise students during all aspects of clinical training.

- 5.3.1. *Complete* the Family Educational Rights and Privacy Act training and review the SHSU FERPA Policy.

- 5.3.2. *Complete* the SHSU Title IX Training and review the Title IX Guidelines.

- 5.3.3. Utilize the SHSU course or specialty syllabus as a training guide.

#### 6. EVALUATION

- 6.1 Provide an introduction to the student that includes: to whom the student directly reports; detailed expectations of the student per the preceptor (e.g., time commitment and service duties); and a discussion of grading policies and expectations.

- 6.2 Discuss preceptor expectations on the first day of clerkship.

- 6.3 Provide informal Mid-Clerkship Evaluation.

- 6.4 Submit a Final Evaluation of the student's performance within 10 days of the clerkship end date.

- 6.5 Provide a letter of recommendation as requested by the student when appropriate.

#### 7. SHSU LEAD AND REGIONAL CLINICAL CLERKSHIP COORDINATORS RESPONSIBILITIES

SHSU Regional Clinical Clerkship Coordinators are the initial point of contact for all matters that pertain to clinical education. The coordinators' primary responsibilities are to be available to assist students and preceptors in the navigation of the clinical rotation. They are expected to be available by email or telephone during regular University business hours (8:00 am to 5:00 pm Monday through Friday).

#### 8. DOCUMENT UPDATES (ONGOING) AND RECREDENTIALING (EVERY 3 YEARS)

- 8.1. The credentialing coordinator in the Office of Clinical Education will maintain current files/verification for the preceptor's medical license and board actions.

- 8.2. Three months prior to the expiration of the preceptor's credentials the credentialing coordinator in the Office of Clinical Education along with the regional clinical coordinator and/or the Lead Clinical Coordinator will verify the medical license and board actions. This file will be submitted to the FESC for approval by the credentialing coordinator.

- 8.3. The SHSU-COM Faculty Evaluation and Selection Committee will review the physician's file and recommend approval or denial of credentialing.
- 8.4. This recommendation will be routed to the Dean for final approval. The preceptor will receive a Notice of Renewal and a new SHSU-COM certificate

## Workflow – Preceptor Credentialing

### Phase 1: Preceptor Recruitment (Ongoing)

- Preceptor is recruited by a member of Sam Houston State University College of Osteopathic Medicine
- Preceptor sends the completed Clinical Faculty Request Form along with a copy of the face sheet of their malpractice insurance via email to COMcredentials@shsu.edu or fax to 936-202-5260.

### Phase 2: Preceptor Application Process (1 week)

- The Office of Clinical Education verifies the following: Medical License, Board Actions, and Board Certification.
- The Clinical Education Credentialing Coordinator prepares a completed application packet for review by the SHSU COM Faculty Evaluation and Selection Committee (FESC).

### Phase 3: Preceptor Application Review (2 weeks)

- The SHSU-COM Faculty Evaluation and Selection Committee will review the physician's file and recommend approval or denial credentialing. This recommendation will be submitted to the Dean for final approval.
- The approved preceptor will be appointed as (Volunteer) Adjunct Clinical Assistant Professor. A preceptor will be considered for a higher rank if the preceptor provides documentation of that rank with another institution.

### Phase 4: Preceptor Onboarding (1-2 weeks)

- The new preceptor will receive a Welcome Letter and SHSU-COM certificate.
- The credentialing coordinator will enter the preceptor's information into Digital Measures, obtain the SHSU email address, and access to the Library and other software for preceptors.
- The professional development coordinator will be notified each time a new preceptor has been processed to review training materials, the Preceptor Handbook, provide training on evaluations, roles, and responsibilities.

### Phase 5: Student Engagement (Ongoing)

- The Office of Clinical Education will collaborate with the preceptors to assign students during rotations based on availability.
- Communication will be monitored through the Excel database.

### Phase 6: Document Update (Ongoing) and Recredentialing (Every 3 years)

- The credentialing coordinator in the Office of Clinical Education will maintain current files/verification for the preceptor's medical license and board actions.
- Three months prior to the expiration of the preceptor's credentials the credentialing coordinator in the Office of Clinical Education along with the regional clinical coordinator will verify the medical license and board actions. This file will be submitted to the FESC for approval.
- The SHSU COM Faculty Evaluation and Selection Committee will review the physician's file and recommend approval or denial of recredentialing. This recommendation will be submitted to the Dean for final approval.
- The preceptor will receive a Notice of Renewal and a new SHSU-COM certificate.