
Appointment Processing for Clinical Fellows

Office of Postdoctoral Affairs

April 26th 2010, 9:00am – 11:00am

MSOB x303

Agenda

- Definitions
 - Appointment Process and Paperwork
 - Submissions and Deadline
 - Required Training
 - Occupational Health
 - Funding and Paying
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What is a Clinical Fellow?

- A Clinical Fellow is a MD, MD/PhD in **advanced years of training** (year 4 or higher) with full or incidental patient contact for the purpose of treatment
 - Clinical Fellow appointments are set up in PeopleSoft with MF (Medical Fellow) plan instead of PD plan. PeopleSoft does not use the term “Clinical Fellow”
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Guidance for Incidental Contact without treatment of patients

- Check Patient Contact on Patient Care Information Sheet or new Recommendation Form and follow Research Compliance guidelines

- Medical Research:

<http://humansubjects.stanford.edu/research/medical/medical.html>

- Nonmedical Research:

<http://humansubjects.stanford.edu/research/nonmedical/nonmedical.html>

Submission of Appointment Packet

- Submit appointment packet to OPA
 - if ACGME program and research years of training
 - if non-ACGME program
 - if PhD with patient contact or in clinical setting, including behavioral research
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How to submit Appointment Packet

- Submit appointment packet to:
 - **Office of Postdoctoral Affairs**
1215 Welch Road
Modular A, Room 84
 - PDF submission via email to postdocaffairs@stanford.edu is preferred method.
 - Do NOT send a copy through ID Mail or by fax. This creates a duplicate file.
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Appointing Clinical Fellows

Clinical Fellow appointments are approved by OPA and by the Office of Graduate Medical Education (GME)

- OPA forwards appointment paperwork to GME review and GME approval, without exception
 - For Non-US MD trainees with patient contact for the purpose of treatment, J-1 visas approved by ECFMG, processed through GME
 - Stanford University (OPA) does not sponsor visas for foreign Clinical Fellows
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Deadline & Required Forms

- For July 1st appointment start dates, all documents (complete packet) must be received in OPA by May 14th
 - A checklist can be found at http://postdocs.stanford.edu/admin/appt_scholars.html
 - The most recent forms can be found at <http://postdocs.stanford.edu/admin/forms.html>
 - OPA will no longer require immunization record data to review appointments
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Required Appointment Forms for New clinical fellows who are initially OR only appointed at Stanford through OPA:

1. Recommendation Sheet for Clinical Trainees
 2. Information Sheet
 3. OPA offer letter
 4. Current CV
 5. Diploma(s) showing conferral of all degrees
 6. Copy of CA Medical License
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Cont.: New clinical fellows who are initially OR only appointed at Stanford through OPA:

- Offer letter through Stanford University not SHC (OPA template)
 - No Offer Letter or Contract with GME
 - GME receives the paperwork from OPA in order to create record in MedHub, communicate with credentialing...
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Required Appointment Forms for continuing clinical fellows who were initially appointed at GME and are moving to OPA

Required:

1. Recommendation Sheet for Clinical Trainees
2. Information Sheet
3. OPA Offer Letter

Preferred but not required:

1. CV
2. Diploma
3. CA Medical License

■ GME is not issuing a contract:

Cont.: Required Appointment Forms for continuing clinical fellows who were initially appointed at GME and are moving to OPA

- Offer letter through Stanford University not SHC
 - No Offer Letter or Contract with GME
 - GME receives the required forms only from OPA in order to continue record in MedHub, communicate with credentialing...
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Changes to Forms

- We will send out an announcement when these forms are available for use:
 - Recommendation Form and Patient Care Information Sheet combined into one form:
 - Recommendation Form for Clinical Trainees
 - Information Sheet – revised fields for relevant information
 - For all July 1 appointments and packets already submitted to OPA for August 1 starts, we will accept appointment packets that use existing forms
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Orientation...

- One New Appointee Meeting (in lieu of Orientation) will be held for fellows moving from GME to OPA
 - Another Meeting will be held for Clinical Fellows whose appointment at Stanford is starting this July through OPA
 - Dates to be announced in May.
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Appointment Processing

- OPA's responsibilities consist of:
 - Term Activation in PeopleSoft Student Administration
 - Creating Student ID (given to Clinical Fellow at Orientation)
 - Setting up a record in BISNet
 - Departments are responsible for:
 - Aid-Year Activation and GFS Aid entry
 - Monitoring the fellows complete all required training and provide immunization data to relevant offices.
 - Salary must be based on Stanford Hospital PGY scale
 - Can be a combination of SoM and SHC sources
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Funding for Clinical Fellows

- All Clinical Trainees at Stanford must receive at least PGY scale support towards their program, whether they are appointed at OPA or at GME
 - OPA follows Stanford policy on funding:
 - If the clinical fellow is in the research training (3rd) year, a combination of School and SHC sources may be used as long as the SHC activity is part of the training program, and as long as it is articulated in the OPA offer letter.
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Paying Clinical Fellows

- **After Aid Year Activation, pay lines can be entered in GFS using Aid Entry**

 - **Clinical Fellows pay**
 - must be supported either by Stanford grants and contracts, training grants, School or departmental fellowship funds, external fellowships, SHC clinical activity provided that it is part of the training program and is documented in the offer letter, or by a combination of these sources (administered in GFS).

 - **Assist Salary Tab**
 - Use Assist Type RAF if 20 hours or more salary
 - Use Assist Type RAFC if less than 20 hours salary
 - Use Assist Type RAF on each PTA if PTAs are <20 hours but total hours salary ≥ 20 . So 10 PTAs each paying 4 hours salary would all be Assist Type RAF

 - **FLSHP Stipend Tab**
 - use if paying stipend
 - use if paid on outside support or through SHC (enter as an Information Only line)
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Paying Clinical Fellows Tuition

- A Registration fee of \$125 is charged per term
 - Assist TAL Tab—use if paid salary. Calc TAL feature on Assist Salary tab will automatically generate tuition for you.
 - FLSHP Tuition Tab—use if paid stipend or by outside support
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Appointment Processing & Pay

- Questions?

Exceptions to Standard Clinical Appointments

- A written request to the Assistant Dean is required in the following cases:
 - MD was conferred more than 6 years ago
 - An initial appointment is requested at less than 100%
 - 90/10 – 90% Postdoc/10% Instructor position
 - Offer letter must indicate 90% postdoctoral compensation separately from 10% instructor compensation
 - Fellow has completed more than 5 years of research
 - Non standard curriculum – Advanced training
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Special Appointments - Exceptions

- Non-U.S. MD Trainees:
 - Can be advanced clinical trainees with MD credentials and/or clinical duties who are non-US citizens or have non-US MD training and are sponsored by Stanford University
 - Requires CA Med Board License Section 2111 exemption



Non-US MD Trainees (Assumes Incidental or Full Patient Contact for the purpose of treatment)

- Visas and CA Med Board License exemption approved by ECFMG and processed through GME
 - ECFMG Certificate Requirement
 - Consideration must be given if trainee desires to complete US residency
 - Trainee may not bill for services
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Non-US MD Trainees

(Research Only – including patient oriented research unrelated to treatment)

- Visas processed through OPA and approved by Bechtel
 - Basic or Clinical Research
 - Not eligible for change in program
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MDs on Visas – J-1 Visa Status Issue

- ECFMG will allow maximum of 7 years of clinical scholar program
 - MDs cannot be appointed to a research appointment (without ECFMG approval) prior to a clinical appointment as this is considered a change in program
 - Completion of studies and 2 year return home requirement:
 - J-1 Research Scholar status
 - J-1 Clinical Scholar status
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VA Trainees

- Must be appointed by Stanford faculty member
 - Usual Stanford Clinical Fellow appointment process
 - Use Stanford contract letter & OK to attach VA proof of support
 - Usually waive OPA Benefits – waiver form is still needed
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PAIRE Trainees

- Separate PAIRE Offer Letter
 - Stanford/PAIRE affiliation agreement applies to international & U.S. postdoctoral scholars
 - PAIRE-funded with Stanford faculty mentor
 - Appointment processed as other Clinical Fellow appointments
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Appointment Preparation and Processing

- Questions?



Requirements Besides OPA Appointment Paperwork

- Occupational Health – Immunizations
 - SPECTRUM
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Occupational Health Services

1101 Welch Road

- Immunization Record is no longer required by OPA
 - Departments must see that fellows complete the required Health and Safety training prior to start of appointment (next slide)
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Occupational Health Services

1101 Welch Road

Required Training and Tests

- GME fellows require pre-hire physical exam

 - All clinical fellows require the following documentation or tests:
 1. Documentation of 2 step TB skin tests within the past 3 months OR
 2. Documentation of Quantiferon test (QFT) within past 3 months.
 3. Chest-X-ray within past 3 months if history of positive TB skin test or QFT
 4. Documentation of Serology/Titer levels for:
 1. Measles/Rubeola
 2. Mumps
 3. Rubella
 4. Varicella
 5. Hep B Ab
 5. Documentation on Tdap and/or Influenza (seasonal)
 6. N95 Respirator Fit Test (highly recommended)
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Clinical Fellows HealthStream Training

- <https://med.stanford.edu/survey/postdochealthstreamform/>
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Spectrum

Stanford Center for Clinical and Translational Education and Research

HealthStream Training for Postdoctoral Fellows involved in Clinical Research

Jessica P. Meyer, MBA, Program Coordinator

Linda S. Walker, Program Administrator



Who is Spectrum?

- Spectrum is the Stanford Center for Clinical and Translational Education and Research
- Within Spectrum is the Office of Compliance, Training and Operations which is the single point of contact for clinical research
- Our mission is to:
 - Align organizational “service” based activities
 - Provide education, training and mentoring to clinical research personnel
 - Develop an integrated research infrastructure



What is HealthStream™ Training?

- HealthStream™ Training is a joint effort of the Spectrum Office of Compliance, Training and Operations and the Postdoctoral Affairs Office, in collaboration with Lucile Packard Children's Hospital (LPCH), and Stanford Hospital and Clinics (SHC).
- HealthStream Training is ***mandatory*** for all non-faculty School of Medicine (SoM) clinical research personnel, involved with clinical (human subject) research and data (clinical trials).



What is HealthStream Training?

- The goal of HealthStream Training is:
 - ❑ ***to protect the health and safety of Stanford University clinical research personnel working with patients, clinical trial volunteers and /or patient health information (PHI)*** and
 - ❑ to provide information and training for the safety of and to equip staff to perform patient-care duties within School of Medicine departments, in LPCH, SHC, VA Palo Alto Health Care System (VAPAHCS) and satellite facilities.
- HealthStream Training is completed through the e-Learning Management Tool- the HealthStream Learning Center™ (HLC).



Are the Postdoctoral Scholars in your department involved in Clinical Research?

- If the postdoctoral scholar has or will have in the next 12 mos.:
 - ❑ In person, face-to-face contact with research participants?
 - ❑ Access to PHI (protected health information) through enrollment, billing, phone screening, data analysis, etc)?
Access to medical records (EPIC/Cerner)?
 - ❑ An office or place where clinical research is conducted in a Stanford Hospital (SHC/LPCH/ and or clinics) Building?

HealthStream Training is **required** if any of the above questions are answered “YES”.



PostDoc HealthStream Training Process

<http://postdocs.stanford.edu>

Step 1: Complete Online Form

<https://med.stanford.edu/survey/healthstreampostdoc>

Step 2: Spectrum Reviews Form

- Determine eligibility.
 - If non-eligible, sends notification to postdoc and department administrator
 - If eligible, creates profile in the HealthStream™ Learning Center (HLC)
 - Sends course assignments to “Students”. Students will have 30 days to complete this training.

Step 3: Spectrum audits Completion Status

- At the end of every month, Spectrum audits postdoc profiles on HealthStream.
- If incomplete, Spectrum will send “Out of Compliance” notices to postdoc, Department Administrator and Alistair Murray

Step 4: Annual Compliance Audits

- Each fiscal year, Spectrum sends non-compliance reports to Rania Sanford and Alistair Murray.



Department Manager Access to HealthStream

Department Managers can obtain access to the HealthStream Learning Center to review and monitor postdoc HealthStream compliance.

Contact Jessica Meyer to obtain access and instructions. You will need to provide the following:

1. Name
2. Department/Division
3. Email
4. Phone
5. Stanford Employee ID # (8-digits)



PostDoc HealthStream Training Modules

Some of these courses have Pre-Assessment Tests

HealthStream Initial Assignments include the following courses:

1. Code of Conduct (includes Deficit Reduction Act)
2. Standard Precautions: Bloodborne Pathogens and Other Potentially Infectious Materials
3. Prevention of Healthcare-Associated Influenza- Infection Control
4. Quality Improvement
5. Patient Rights
6. Safety Reporting- Patient Safety Net
7. Electrical Safety
8. Emergency Preparedness
9. Fire Safety Awareness and Response
10. Confidentiality Statement
11. Service Excellence (SHC or LPCH)
12. National Patient Safety Goals
13. Respiratory Therapy
14. Cultural Diversity – Sexual Harassment
15. Prevention of Hospital Acquired Infections



PostDoc HealthStream Training Modules

Some of these courses have Pre-Assessment Tests

HealthStream Annual Assignment:

1. **Rapid Regulatory Compliance:** Clinical II:Gen/Fire/Elec/Back/Rad./MRI Safety, Ergo, Lift/Transp, Slips/Trips/Falls, LatexAllergy, HazComm, WorkplaceViol., EmergPrep, Infec.Control:HAI, HandHyg, Bloodborne, StdPrec, Airborne/Contact/Droplet Prec, PPE



Additional Clinical Research Training

Please see Clinical Research Personnel Training Checklist (PostDocs)

- Additional Training may be required:
 - ❑ CITI Training (Human Subject Research Protection) from the IRB
 - ❑ eProtocol Training from the IRB
 - ❑ See Training Assessment in STARS via AXESS (<http://axess.stanford.edu>)
 - ❑ Biohazardous Material Training from EH&S

- Also recommended are the Spectrum Orientations
 - ❑ General Orientation- How to Conduct Clinical Research at Stanford
 - ❑ Budgeting and Billing- How to Budget a Study and how the Billing System works at Stanford
 - ❑ Please see the Education Calendar for dates and to register.
(http://spctrm.stanford.edu/training_html)



Clinical and Translational Research Resources

(see CTR Training Checklist for PostDocs)

- **Cancer Center** <http://cancer.stanford.edu>
- **Research Compliance Office** <http://humansubjects.stanford.edu>
- **Environmental Health & Safety**
<http://med.stanford.edu/somsafety/training.html>
- **Spectrum, The Stanford Center for Clinical and Translational Education and Research** <http://sccter.stanford.edu> (site under construction)
 - **Spectrum | Child Health** <http://spectrumchildhealth.stanford.edu>
 - **Spectrum | Office of Compliance, Training and Operations** <http://spctrm.stanford.edu> ;
Email: clinicaltrials@med.stanford.edu
 - Services: CTR Planning; Biostatistics Consultation; Education and Training; Help Desk/Facilitator Services; Research Coordinator Services; Regulatory and Compliance Consultation; CTR Management Tools and Services; Websites

SPECTRUM Questions??

■ Contact:

- Jessica P. Meyer, 650-498-6140,
jpmeyer@stanford.edu
 - Linda Walker, 650-498-6498,
linda.walker@stanford.edu
 - Geraldine Solon, 650-721-1071,
gsolon@stanford.edu
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Future Sessions

- Ending Appointments Successfully
 - May 24th – Modular A, 62. 10 am – 11:30 am

