

Tips for Organizing a Clerkship

Organizing a clerkship is challenging to the experienced administrator and can be overwhelming for anyone new to the process. This chapter provides strategies that have helped experienced administrators break the job down into separate, manageable tasks.

Understand the Structure of the Clerkship

An important place to begin is to understand the chain of command. How do other people contribute to the components of the clerkship? Effective administrators understand their role along with the roles of every other person involved in the clerkship. These relationships may include:

- Clerkship Director > Site Director
- Clerkship Administrator (CA) > Site Coordinator > Office/Unit Staff
- Attending Physicians > Residents > Interns
- School Administration (Registrar, Student Services/Affairs, Dean's Office, library staff, information technology, security/access, etc.)

Once those involved are established, work to understand who is responsible for the following:

- Assigning the students to each site (i.e., community sites, hospital sites)
- Assigning students to each specific rotation
- Coordinating student schedules within each site for each rotation
- Evaluation and grading
- Communication with students regarding the various aspects of their clerkship experience
- Credentialing of sites
- Electives

Time/Organization Management

Learning to manage time is an ongoing process. Networking with clerkship administrators across specialties and through national organizations helps develop new strategies. Effective time management strategy is based on personal traits and tendencies. One key point to remember is to be flexible in planning. Allow for the unexpected and plan with the end in mind. The only sure thing in a schedule is that the unexpected will happen. Three essential steps to efficient time management are organization, prioritizing, and scheduling.

Organization

Plan weekly and act daily. Each week, identify the few key tasks that must be accomplished to make progress toward goals. Ask the following questions during list preparation: “What are the few key objectives I have to accomplish this week to advance my goals?” and “What key tasks must I complete to accomplish these objectives?” Task lists in MS Outlook® calendar can assist in list preparation. (One helpful tip: it is possible to drag an email to the Outlook task list.)

Prioritizing

The next step is to list tasks and objectives in order of priority with the intention of working on higher priority tasks first. Try not to overestimate capabilities, and do not leave big projects for the last second. It will happen, but try to keep the last-minute scramble to a minimum.

Scheduling

On a weekly basis, review the schedule while keeping in mind the prioritized task list. Do not get overly ambitious—there is no need to plan out every minute of the day. Devise a reasonable schedule that is possible to follow.

Effective planning is a skill that takes time to acquire and polish. The process of time management does not end with the creation of some lists. Planning and monitoring can seem time consuming, however are necessary to use time more effectively. The trial-and-error approach is an essential part of the process.

A time plan is most successful when it is not written in stone; cultivate the sensitivity to recognize productivity. Learn to recognize when putting off a task and doing something else is an intelligent, conscious decision and when it is merely procrastination. Sometimes, walking away from a project for a few minutes can be the best thing to bring a new perspective to a problem. Expecting the unexpected and building flexibility into the time plan makes achieving goals more realistic.

Organizational Tools – Where To Begin

Clerkship Calendars

The first priority for organizing a clerkship is to develop an annual calendar. Starting with a general calendar with dates and activities that affect all sites and students will provide important general information to anyone involved in the clerkship and aid with overall organization. **Appendix 1** is an example of a simple general schedule. The general calendar incorporates schedules from the institution, school, department, and program into one single document. The structure of the year's activities will be based on the school's clerkship schedule and then segmented into rotations during the clerkship period. Whether the clerkship is four, six, eight, or 12 weeks in length, the repetition of rotations in the academic year allows a relatively rigid time frame for each element of the clerkship. Variations in the schedule can occur due to national and local holiday dates and regional teaching site availability. These variations are easier to accommodate when planned for through the use of a general calendar.

The period of planning and developing the calendar for the upcoming year is also a good time for the clerkship director and clerkship administrator to establish priorities for the new series of rotations. Considering these issues while developing the general calendar encourages the administrator and director to look at how and when expectations and requirements will be communicated with the students and site coordinators. Implementing changes before the new academic year begins and maintaining them throughout the entire year will provide a consistent experience for all students.

From the general clerkship calendar, a site calendar can be developed with specific events. See **Appendix 2** for site calendar inclusion ideas. Staffing and vacation schedules can be considered after the general and site-specific calendars are created.

Once the clerkship calendars are finalized for each rotation, creating the didactic and other scheduled activities allows the administrator to schedule speakers, equipment, rooms, and any special staff requirements. The clerkship calendars also allow one to create checklists to use as reminders of tasks that need to be completed (see **Appendix 3**).

Electronic Aids

The extensive degree of planning and communication required to provide a successful clerkship to an entire class of students in multiple settings is often extensively supported by the use of electronic communication.

Email is almost essential and, fortunately, almost universally available. Medical students are often easily reached and quick to respond. Email also provides documentation of student communications. Be sure to understand the Family Educational Rights and Privacy Act (FERPA) rules regulating privacy of email communication and students who have opted to not publish personal information in the medical student directory (**Appendix 4**). To manage email, use a program such as MS Outlook® to track conversations in color, flag messages requiring action, and create folders to manage email messages. Creating template email messages for recurring reminders to students, meeting notices, and orientation instructions saves time and maintains consistency in the information presented. Electronic calendars can streamline the creation of a master calendar. Functions such as recurring tasks and meeting reminders can help one stay on track. In some cases, the calendar from the previous year can be copied to the next. Many administrators use a desk calendar, either primarily or in conjunction with an electronic calendar.

Networking computers or the use of a shared drive aids in consistency and accuracy by allowing the administrator and director—as well as others involved in the clerkship—to work from a single document. Working from a server makes it possible to access documents off site and to back up files, which can be invaluable when coordinating a busy office.

A clerkship website saves time in communicating curricula and department policies and can be used to collect accreditation requirement information, such as clinical examination (CEX) or patient logs. A website must be well-maintained and all information must be updated regularly throughout the year. Be sure that the information on the website is consistent with the plan for the next/current year rather than the previous year.

Course management software such as BlackBoard® and ANGEL® link on-campus and distance learning. Course management software could include calendars, instructor chat, course content, course discussion tools, email, grades, class list information, quizzes, and personal homepages.

Additionally, electronic scheduling and evaluation programs are helpful and can enhance the accuracy, efficiency, and effectiveness of the assignment and evaluation process.

The Student List

The clerkship year begins when the master list of students for the following academic year is received. Ideally, a complete – although likely tentative – list for the upcoming year would be available at least two months before the first day of the first clerkship. The ensuing two months can be the most important period in the clerkship year. If the master student list does not incorporate all of the pertinent information needed for each student— email address, pager number, mailing address, site—compiling this information into one document will facilitate the smooth flow of activities throughout the year. Incorporated into a spreadsheet or database, this information can be used for labeling student files, mailing grades, creating email and pager lists to forward to clerkship sites, and a variety of other activities. If electronic student photos are accessible, this may be a good time to sort them according to clerkship and rotation so they can easily be distributed as needed.

Site Administration

Updating Site Information

Contact teaching sites prior to the start of the academic year to see if there are changes in enrollment numbers, physician or administrative staff contacts, credentialing, or reporting locations. Requesting updates from the site clerkship administrator will enhance communication throughout the year and increase the likelihood of being informed of changes prior to their implementation. Communication with the site is always better than providing students with outdated information and dealing with the resulting confusion. When requesting this information, include a copy of the general calendar with the rotation dates and expectations for site administrators.

While some faculty site coordinators prefer to receive all information personally and distribute to the site staff as required, others choose to have all information sent to the site administrator who will coordinate activity within the site. Providing all required information to the correct person will allow a smooth transfer of students from site to site with appropriate documentation, credentialing, training, privileges, and housing.

Scheduling the Students

After the calendar is complete, master student list received, and the site information updated, provisionally assigning students to rotation sites for the year or upcoming rotation block can begin. For jigsaw puzzle fans, coordinating a complex arrangement of rotations incorporating both inpatient and outpatient experiences in a combination of four-, six-, eight-, and 12-week rotations may be a favorite part of the planning process. Time permitting, it is helpful to consider scheduling students for the entire year as it helps answer questions from students, faculty, and deans regarding site availability and possible student additions to the clerkship.

Communicating with Sites

Once assignments are made, the clerkship administrator can distribute information to the sites. Teaching sites may request student registration information at the beginning of the academic year to coordinate physician coverage, housing, student credentialing, and site-specific training. Make sure to inform sites of schedule changes and confirm student assignments as the start date gets closer.

When distributing information to each site, include the student name, contact information, and rotation dates. Although requests for contact information may be received from sites throughout the year, providing the information at the beginning of the year will reduce the number of special requests, and therefore the number of distractions, during the busiest times.

Communicating with Students

The next step may be the most challenging and most essential element in organizing the clerkship: communicating clerkship requirements, policies, and procedures to the students. Although some elements of the clerkship may change from year to year, the basic structure remains pretty much the

same and becomes second nature for the clerkship administrator and others closely involved. While some personnel will be new each year, most individuals will have completed the clerkship cycle many times over the years and can often predict what will happen throughout the upcoming year. However, for the students, it is a new experience. Even students in the final clerkship of their third year will have only minimal knowledge of how the department's clerkship is organized. Just as great variety exists between institutions in organizing the clerkship, there is variety among the departments within an institution in activities and procedures. Completing a clerkship in another department provides the students with a degree of sophistication about the clerkship experience, but it does not provide them with any information about how each specific clerkship is organized.

Communication During the Clerkship

Communication opportunities can be enhanced by a scheduled orientation for all students on the first day of the clerkship or during the first week of the clerkship. Important topics to be covered by the clerkship director or clerkship administrator at this orientation are expectations, activities, responsibilities, feedback, evaluations, exams, assignments, communications, and grading. A printed or electronic resource to which the students can refer easily should be distributed to supplement the oral instructions. It also protects the clerkship and department from claims that students were not aware of requirements. Build in time for students to ask questions and discuss issues of concern. Students should be encouraged to contact the clerkship administrator or director with questions at any time throughout the clerkship.

Contacting the students throughout the clerkship to remind them of requirements (e.g., mini-CEX and patient logs they have not completed as well as lecture and schedule changes) will aid the students in being successful in the clerkship.

Feedback and Evaluations

Throughout the clerkship, faculty and residents should provide oral feedback as well as complete written evaluations on the students. It is the clerkship administrator's responsibility to collect and track all written or online evaluations. It is important that evaluations are monitored in a

timely manner for the clerkship director to provide feedback to the students at mid- and end-of-clerkship feedback sessions. Evaluations are also important for completion of the grading process.

Any individuals working with students need to be aware that in addition to frequent feedback and timely evaluations of the student, they are responsible for immediately informing the clerkship director/site coordinator or administrator of any special issues or concerns regarding a student's conduct or performance.

Final Examination

The end-of-clerkship exam is typically scheduled in the last week of the clerkship, often on the last day. It is important that a location for administration of the exam is secured well in advance (if it is the clerkship administrator's responsibility.)

The most important elements in clerkship administration are organization and communication. With effective preparation and a reliable means of communication, one can accomplish anything.

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Appendix 1: General Schedule Example (Can also be done in calendar format)

General Clerkship Schedule 2008-2009

SUMMER II, 7/7-8/29/08

7/7	Orientation
7/11	Student Education Day
8/1	Access to Care Modules due
8/1	E*Value: Schedule Mid-Clerkship Evaluations for this date
8/4	Performance Base Assessments
8/18-28	Ambulatory
8/22	All E*Value evaluations must be scheduled by this date
8/29	Log Requirements must be met by 5:00pm
8/29	Final Exam
9/2	Evaluations by students due by 5:00pm
10/3	All Evals should be Reviewed & Released by this date
10/17	Grade Memos Due

FALL I, 9/2-10/24/08

9/2 (Tues)	Orientation
9/12	Student Education Day
9/26	Access to Care Modules due
9/26	E*Value: Schedule Mid-Clerkship Evaluations for this date
10/1	Performance Based Assessments
10/3	Hunt Lecture (3:00-5:00) – All students – allow travel time
10/13-23	Ambulatory
10/17	All E*Value evaluations must be scheduled by this date
10/24	Log Requirements must be met by 5:00pm
10/24	Final Exam
10/27	Evaluations by students due by 5:00pm
11/28	All Evals should be Reviewed & Released by this date
12/12	Grade Memos Due

FALL II 10/27-12/19/08

10/27	Orientation
11/7	Student Education Day
11/19	Access to Care Modules due (<i>holiday week</i>)
11/19	E*Value: Schedule Mid-Clerkship Evaluations for this date
<i>11/20-21</i>	<i>Thanksgiving, University Holiday - Students Off</i>
11/26	Performance Based Assessments
12/8-18	Ambulatory
12/12	All E*Value evaluations must be scheduled by this date
12/19	Log Requirements must be met by 5:00pm
12/19	Final Exam
12/21	Evaluations by students due by 5:00pm (<i>shortened by 1 day due to holiday and students time off</i>)
1/23/09	All Evals should be Reviewed & Released by this date.
2/13/09	Grade Memos Due

Appendix 2: Site Specific Calendar Ideas

Clerkship start dates
Site assignment due date
Due date for website update
Due date to email/mail students clerkship orientation information
Due date to email/mail students credentialing paperwork for clinics and hospitals
Orientation date
Site switch dates
Due date for completion of didactic schedule
Due dates for various reminder emails to students: tracking patient logs, mini-clinical examination
OSCE dates
Exam date (include due date for ordering exams and rooms)
Evaluation due dates
Grade meeting schedule
Graduation date

Appendix 3: Sample Checklists

Sample Checklist – Beginning an Academic Year to End of a Rotation

- Get student data (i.e., email address, pager number, home address, photos)
- Expound on the general calendar (if you received one from elsewhere) or create your own.
- Create rotation specific calendars and prepare schedules *which may include*:
 - Lectures/didactics - arrange preceptors and rooms
 - Distribute to preceptors before rotation begins
 - OSCE , mini-CEX, PBA – arrange preceptors and rooms
 - Call schedules
 - Mid-clerkship evaluations
 - Hospital assignment/preceptor schedules
 - Ambulatory (out-patient) assignment schedule
 - Evaluation assignments – do you know who the student worked with?
- Know the syllabus/handbook and clerkship requirements.
 - As first contact for the clerkship, you must be familiar with all requirements, from attendance to graded activities.
- Clerkship materials
 - Print and/or up-load into clerkship websites (if applicable and not done by someone else).
 - Make sure appropriate students have access to any web-based systems and if necessary, deactivate any students from the previous year who should no longer have access.
 - Prepare orientation packets or course packs (which usually include many of the clerkship materials). This can be done for the year or before each rotation begins.
 - Communicate orientation information to students
 - If necessary, print grading sheets for graded activities and have available for graders
- Create student folders or portfolios if used at your location
- Create a tracking system to track graded student activities and miscellaneous assignments (electronically often works best)
- Order exams that are not in-house as appropriate
- Use a system to remind yourself of activities, due dates, etc. (Outlook calendars/tasks work very well)

During the clerkship:

- Attend orientation if possible (at some sites the clerkship administrator may conduct orientation).
- Communicate with the clerkship director so you are on the same page
- Keep in contact with the students – let them know you are accessible and willing to answer questions.
 - Adult learners still need reminders of due dates and scheduled activities.
- Schedule activities that cannot be done in advance.
- Coordinate and participate in various learning events during the clerkship.
- Track scheduled activities and requirements (i.e., Logbooks, H&Ps, assignments, etc.) Mechanisms to do this electronically may be built into evaluation systems, logbook systems, or other programs.
- Schedule or send evaluations and track online/collect
- Proctor exams
- Schedule time off as the clerkship schedule allows or arrange coverage for exam proctoring, etc., by a qualified individual. This is tough, but necessary!

After the clerkship:

- Organize student grade data into an electronic system, student folder or portfolio (whatever means is used at your campus) so a final grade can be assigned.
- Finalize grade and correspondence (widely variable on how this is done).
- Attend grade meeting, if applicable
- Mail information to students, if applicable, or submit to the appropriate personnel at your school/institution.

Ambulatory Scheduling Checklist

- Non-Employee Enrollment (Computer Access/Security)
 - Fill out computer access form
 - Send notice to police and security
 - Request LMR Access
- Orientation
 - Text Books
 - Pagers
 - Log-on Information
 - Hand outs
 - Confirm director
 - Distribute Schedules
- Schedules
 - Collect preferences from students
 - Collect availability of clinics from the following faculty
 - Ambulatory Preceptors
 - Eye & Ear Clinic
 - Medical Walk-In Clinic (or Urgent Care Clinic)
 - Diabetes Clinic
 - Dermatology Clinic
 - Heme/Onc. Clinic
 - Cardiology Clinic
 - Compose schedules
- Didactic Sessions (schedule faculty)
 - Eye & Ear
 - Dermatology
 - Ambulatory Cases
 - EKG/Cardiology

Appendix 4: Family Educational Rights and Privacy Act (FERPA)

Family Policy Compliance Office (FPCO) Home

The Family Educational Rights and Privacy Act (FERPA) (20 U.S.C. § 1232g; 34 CFR Part 99) is a Federal law that protects the privacy of student education records. The law applies to all schools that receive funds under an applicable program of the U.S. Department of Education.

FERPA gives parents certain rights with respect to their children's education records. These rights transfer to the student when he or she reaches the age of 18 or attends a school beyond the high school level. Students to whom the rights have transferred are "eligible students."

Parents or eligible students have the right to inspect and review the student's education records maintained by the school. Schools are not required to provide copies of records unless, for reasons such as great distance, it is impossible for parents or eligible students to review the records. Schools may charge a fee for copies.

Parents or eligible students have the right to request that a school correct records which they believe to be inaccurate or misleading. If the school decides not to amend the record, the parent or eligible student then has the right to a formal hearing. After the hearing, if the school still decides not to amend the record, the parent or eligible student has the right to place a statement with the record setting forth his or her view about the contested information.

Generally, schools must have written permission from the parent or eligible student in order to release any information from a student's education record. However, FERPA allows schools to disclose those records, without consent, to the following parties or under the following conditions (34 CFR § 99.31):

- School officials with legitimate educational interest;
- Other schools to which a student is transferring;
- Specified officials for audit or evaluation purposes;
- Appropriate parties in connection with financial aid to a student;
- Organizations conducting certain studies for or on behalf of the school;
- Accrediting organizations;
- To comply with a judicial order or lawfully issued subpoena;
- Appropriate officials in cases of health and safety emergencies; and
- State and local authorities, within a juvenile justice system, pursuant to specific State law.

Schools may disclose, without consent, "directory" information such as a student's name, address, telephone number, date and place of birth, honors and awards, and dates of attendance. However, schools must tell parents and eligible students about directory information and allow parents and eligible students a reasonable amount of time to request that the school not disclose directory information about them. Schools must notify parents and eligible students annually of their rights under FERPA. The actual means of notification (special letter, inclusion in a PTA bulletin, student handbook, or newspaper article) is left to the discretion of each school.

For additional information or technical assistance, you may call (202) 260-3887 (voice). Individuals who use TDD may call the Federal Information Relay Service at 1-800-877-8339.