**UNIVERSITY OF MASSACHUSETTS MEDICAL SCHOOL**

**STANDARD OPERATING PROCEDURE FOR**

**MEDICAL, GRADUATE NURSING, GRADUATE BIOMEDICAL SCIENCES AND GRADUATE MEDICAL**

**INTERNATIONAL CLINICAL, RESEARCH AND CULTURAL SITE EVALUATION AND APPROVAL OF LEGACY SITES**

The purpose of a standardized site evaluation is to ensure that UMMS medical students, graduate nursing students, graduate biomedical sciences students and fellows, and graduate medical residents (“trainees”) receive the highest level of training and education from UMMS and its clinical, research and educational collaborators. All long-term legacy clinical, research or cultural sites for UMMS trainees must fill out a **Site Information Form** (SIF). The SIF must be approved by the appropriate educational program (SOM, GSN, GSBS and GME) and the Office of Global Health prior to trainee preceptorships or internships. Once approved, the clinical, research or cultural sites will be listed as legacy sites for trainee clinical, research and educational training.

**Requirements for Clinical Sites**

Clinical sites that host UMMS for international clinical experiences should meet the criteria below:

1. Patient volume at the site is adequate to ensure sufficient numbers and types of patients per day for trainees to acquire the skills required to meet core curriculum guidelines, program goals and practice.
2. Clinical site has adequate space available for trainees (examination room, area for documentation, break room, etc.).
3. Clinical site has adequate resources available on site including:
   1. Physician consultation,
   2. Medical record system,
   3. Current medical reference books or Internet access for searching, and
   4. Emergency medical care (or information about obtaining emergency medical care).
4. Clinical site has orientation programs in place to introduce the trainees to the facility including: facility and department rules and policies, procedures for handling emergency codes, working hours, dress code, educational opportunities, etc.
5. Clinical site has identified at least one skilled clinical preceptor assigned to mentor trainees (see requirements below). This individual will be familiar with learning objectives relevant to the trainee’s level of experience and preparation, and will provide feedback to trainees during the experience, and a formal written assessment of trainee performance at the conclusion of the experience.
6. The site must indicate that there are no trainee safety concerns.
7. It is highly preferred that the clinical site provides safe housing and transportation for trainees (both male and female). If this is not provided, alternate safe housing and transportation plans have to be approved by the UMMS program director.
8. Complete a Clinical and Research Site Information Form (CRSIF). The form can be obtained from the Office of Global Health ( [globalhealth@umassmed.edu](mailto:globalhealth@umassmed.edu)).

**Requirements for Clinical Preceptor**

The clinical preceptor must be:

1. Formally educated for professional practice:
   1. Physician (MD or DO),
   2. PhD, DNP or Master’s prepared advanced practice nurse (APRN) or Licensed Registered Nurse (RN) or Certified Midwife, or
   3. Physician assistant (PA).
2. Currently licensed to practice in the country where the clinical site is located.
3. National or regional certification highly preferred.
4. Currently practicing in a field relevant to the preceptorship.
5. Preceptorship training and/or experience highly preferred.
6. Knowledgeable regarding UMMS medical, graduate nursing, graduate biomedical sciences and graduate medical program expectations, requirements and evaluation procedures for trainees.

**Requirements for Research Sites**

Research sites that host UMMS trainees for international research experiences should meet the criteria below:

1. Research site has adequate space available for trainees (laboratory bench, area for documentation and analysis, break room).
2. Research site has adequate resources available on site including:
   1. Research equipment and supplies relevant to research project,
   2. Current research reference books or Internet access for searching, and
   3. Emergency medical care (or information about obtaining emergency medical care).
3. Research site has orientation programs in place to introduce the trainees to the facility including: facility and department rules and policies, procedures for handling emergency codes, biosafety and ethics training, working hours, dress code, educational opportunities, etc.
4. Research site has identified at least one skilled research preceptor assigned to mentor trainees (see requirements below). This individual will be familiar with learning objectives relevant to the trainee’s level of experience and preparation, and will provide feedback to trainees during the experience, and a formal written assessment of trainee performance at the conclusion of the experience.
5. The site must indicate that there are no trainee safety concerns.
6. It is highly preferred that the research site provides safe housing and transportation for trainees (both male and female). If this is not provided, alternate safe housing and transportation plans have to be approved by the UMMS program director.
7. Complete a Clinical and Research Site Information Form (CRSIF). The form can be obtained form the Office of Global health ([globalhealth@umassmed.edu](mailto:globalhealth@umassmed.edu)).

**Requirements for Research Preceptor**

The research preceptor must be:

1. Formally educated for research practice:
   1. Principal Investigator (PhD, MD, or MD/PhD),
   2. Post-doctorate Research Fellow (PhD),
   3. Post-graduate Research Fellow (Masters), or
   4. Research Technician (BS or BA).
2. Currently doing research in a field relevant to the preceptorship.
3. Approved by the relevant IACUC or IRB regulatory body to do research relevant to the preceptorship training.
4. Preceptorship training and/or experience highly preferred.
5. Knowledgeable regarding UMMS medical, graduate nursing, graduate biomedical sciences and graduate medical program expectations, requirements and evaluation procedures for trainees.

**Requirements for Cultural Immersion Sites**

Sites that host UMMS trainees for international cultural experiences should meet the criteria below:

1. Site has adequate space to accommodate trainees’ needs including access to medical care (or information about obtaining emergency medical care).
2. Site has orientation programs in place to introduce the trainees to the facility including: facility and department rules and policies, procedures for handling emergencies, working hours, dress code, educational opportunities, etc.
3. Site has identified at least one skilled preceptor assigned to mentor trainees (see requirements below). This individual will be familiar with learning objectives relevant to the trainee’s level of experience and preparation, and will provide feedback to trainees during the experience, and a formal written assessment of trainee performance at the conclusion of the experience.
4. The site must indicate that there are no student safety concerns.
5. It is highly preferred that the site provides safe housing and transportation for trainees (both male and female). If this is not provided, alternate safe housing and transportation plans have to be approved by the UMMS program director.
6. Complete a Cultural Immersion Site Information Form (CISIF). The form can be obtained from the Office of Undergraduate Medical Education (<OUME@umassmed.edu>)

**Requirements for Cultural Preceptor**

The preceptor must be:

1. Formally educated for their job responsibilities.
2. Preceptorship training and/or experience highly preferred.
3. Knowledgeable regarding UMMS medical, graduate nursing, graduate biomedical sciences and graduate medical program expectations, requirements and evaluation procedures for trainees.

**Clinical, Research and Cultural Site Evaluation and Approval Process**

The following procedure should be followed to establish a new Site:

1. Contact the Office of Global Health for a Clinical and Research Site Information Form (CRSIF). Once the form is completed, it should be emailed to Office of Global Health ([globalhealth@umassmed.edu](mailto:globalhealth@umassmed.edu) )

In the case of a Cultural Immersion Site contact the Office of Undergraduate Medical Education (OUME) for a Cultural Immersion Site Information Form (CISIF). The completed form should be emailed to OUME ([OUME@umassmed.edu](file:///\\ummsnas01\globalhealth$\OGH%20POLICY%20and%20FORMS\SOP's\OUME@umassmed.edu))

1. The forms should be completed jointly by UMMS advising faculty and a faculty member from the Clinical, Research or Cultural Site.
2. Site selection should take into account UMMS travel policy (<http://umassmed.edu/globalhealth/travelpolicies.aspx>), which specifically prohibits students (medical, graduate nursing and graduate biomedical sciences), residents, or post-doctoral fellows travel under UMMS auspices or supervision to countries or regions for which the State Department forbids or otherwise recommends avoidance of travel. In limited circumstances, only GSBS postdoctoral fellows and GME residents may submit a program waiver request, along with a Site Information Form and Departmental signoff, to support the creation of programs within countries on the US Department of State warning list. These travel waiver requests will be reviewed on a case-by-case basis.
3. The completed CRSIF or CISIF will be disseminated for UMMS internal review. You will receive an electronic copy of the SIF requesting more information or clarification once the UMMS internal review is completed. UMMS internal review will be conducted at minimum by OGH (Associate Provost, Co-Director) and the following education program officers:
   * Dean of Graduate School of Nursing (Paulette Seymour-Route, PhD, RN, MS)
   * Senior Associate Dean for Educational Affairs (Michele Pugnaire, MD)
   * Associate Dean of Graduate Medical Education (Deborah DeMarco, MD)
   * Dean of Graduate School of Biomedical Sciences (Anthony Carruthers, PhD)
4. Once the SIF has been reviewed and the site approved for UMMS trainee clinical, research and educational training, the site will be added to the Office of Global Health website as an approved and preferred student and trainee preceptorship and internship location.
5. The SIF is due a minimum of 60 days prior to the program or training start date. It is the responsibility of the UMMS contact to obtain approval and signoff from the appropriate UMMS education program officer using the routing form attached. Once the site has been reviewed by all education program officers and the Office of Global Health, a letter of approval will be issued to the UMMS contact, the site and the appropriate UMMS education programs.
6. Existing sites may continue to host trainees at the discretion of the sponsoring UMMS educational site until December 2013 when a SIF will be required.

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