

Policy:	Observer (Medical and Non-Medical)				
Policy Owner:	Director, Medical Affairs				
SLT Sponsor:	IVP, Medical & Academic Affairs				
Approval By:	Director's Council and Medical Advisory Committee	Approval Date:	2018-10-11		
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POLICY

London Health Sciences Centre (LHSC) is committed to teaching and to offering learning experiences to individuals who are not staff or [affiliates](#) of LHSC. These individuals, called [observers](#), are offered an opportunity to attend at the organization to gain knowledge and expertise about health care and/or the functioning of the organization. This may involve the opportunity to observe specific procedures and/or patient care processes.

Approval of Observership

Approval from the relevant Department Chief, Program Director, Manager Professional Practice, Clinical Coordinator or delegate must be obtained prior to agreeing to the presence of the Observer, and the individual approving the Observership must consider whether the Observership is consistent with and based on:

- The mission and values of the organization,
- Ensuring the safety of the patient,
- Respecting and maintaining the privacy of the patient and his/her family, and
- Protecting the confidentiality of patient information and confidential business information of the organization.

Observer Role

An observer is not permitted, in any circumstances, to provide any patient care, including but not limited to:

- Taking a medical history,
- Conducting physical examinations,
- Diagnosing or treating patient's condition,
- Ordering, preparing or administering drugs,
- Documenting on patients' health records, either in electronic or hard copy format,
- Having independent access to health records, either in electronic or hard copy format,
- Performing or assisting in surgical procedures, or diagnostic patient interventions,
- Obtaining consent,
- Interacting directly with patient/substitute decisions maker (SDM), and
- Providing health care advice.

Observer Contact with Patients

If it is anticipated that the Observer will be present during any contact with a patient/SDM, the [Sponsor](#) must:

- Obtain verbal consent from the patient/SDM to allow the Observer to be present at the time of the clinical visit, procedure or other patient service,
- Introduce the Observer to the patient/SDM and explain the reason for the Observership, and
- Document patient/SDM consent in the patient's health record.

Duration of Observership

Attendance by an Observer should not exceed 12 weeks unless an extended period is deemed necessary by the Department Chief (or Division Leader), Sponsor and the Observer. Re-application is required if the Observership is longer than 12 months.

An observer is not considered an employee or affiliate of the hospital and therefore is not:

- Entitled to salary, benefits, reimbursement of expenses or other forms of compensation,
- Covered under the Workplace Safety and Insurance Board (WSIB),
- Covered under the organization's liability insurance,
- Entitled to receive educational credit or certification from the organization for time spent observing, and
- Entitled access to Occupational Health Services.

Custom tours for researchers, scientists, physicians, hospital administrators and staff from other hospitals, health care agencies and government must comply with the procedure and rules as outlined below. Any request for a custom tour involving more than one program, must ensure that all programs are notified prior to the agreed upon tour date.

LHSC may terminate an Observership at any time at its sole discretion. Concerns regarding the appropriateness of the Observer will be addressed by the Sponsor and, if necessary, by the Sponsoring Department Chief/program leader. Concerns regarding the appropriateness of an Observer in Perioperative Care will be dealt with by the Perioperative Care Coordinator, Chief of Surgery and Chief of Anesthesia.

PROCEDURE

1. At Least Two Weeks Prior to the Observership

1.1. The Sponsor will:

- 1.1.1. Provide Observer with documentation package ([Appendices](#)) to complete and submit to the Sponsor at least two weeks prior to the planned attendance of the Observer.
- 1.1.2. Review completed documentation submitted by Observer to ensure that information provided is complete, forms signed and the request for Observership is compliant with this policy.
- 1.1.3. Forward the completed and signed documentation to the appropriate leaders (i.e. Department Chief, Division Chief, Site Chief, Clinical Director, Manager Professional Practice (Clinical Coordinator or delegate) for their review and approval/support.
- 1.1.4. Once approved/supported by appropriate leaders, submit all required documentation one week prior to start date to:
 - 1.1.4.1. Medical Affairs – If the Observer's sponsor is a credentialed physician/dentist/midwife, or
 - 1.1.4.2. Student Affairs – If the Observer's sponsor is not credentialed as a physician/dentist/midwife.

1.2. The Observer will:

- 1.2.1. Review the documentation package.
- 1.2.2. Complete & sign:
 - 1.2.2.1. Observer Request Form ([Appendix A](#)),
 - 1.2.2.2. Observer Privacy and Confidentiality Agreement ([Appendix B](#)),
 - 1.2.2.3. Medical and Non-Medical Observers - Self-Screening Health Evaluation ([Appendix C](#)), and
 - 1.2.2.4. Infection Prevention and Control Core Competency Training ([Appendix D](#)).
- 1.2.3. Forward all documentation requirements to the Sponsor at least one week prior to the requested date of attendance.

1.3. The Department/Division/Site Chief, Clinical Director, Manager Professional Practice, Clinical Coordinator or delegate will:

- 1.3.1. Review the Observer's completed documentation and provide support/approval for the Observership or decline the Observer's request if the request is not consistent with this policy.

1.4. Medical Affairs/Manager Professional Practice, Clinical Coordinator or delegate will:

- 1.4.1. Notify relevant leader(s) and/or staff for all departments/programs/services/areas of which the Observer will be attending by identifying the Observer's name and Sponsor (e.g. inform the Perioperative Service Manager/Director if the Observer will be in the OR).
- 1.4.2. Retain all Observer documentation for a minimum of six years after the completion of the Observership. If Observer Sponsor is not a physician/dentist/midwife, documentation is to be forwarded to Student Affairs.

2. On the Observer's Arrival Date

2.1. The Sponsor will:

- 2.1.1. Validate the Observer's photo identification (e.g. Passport photo, valid Driver's License), where applicable.

- 2.1.2. Ensure receipt of any outstanding documentation information, i.e. credentialing or certification requirements are obtained, if necessary.
- 2.1.3. Facilitate Observer obtaining an LHSC visitor badge by signing-out one of the generic/visitor badges in the Customer Support office. Generic ID badges must be obtained in the Customer Support office of the site the Observership will be affiliated, where applicable.
- 2.1.4. Sign-out the ID badge and return the ID badge when the Observership ends.
 - 2.1.4.1. If an Observer has a valid photo ID from another health care organization (or educational institutional badge), he/she must wear this ID while on hospital premises.
- 2.1.5. Provide orientation to the Observer, including:
 - 2.1.5.1. Overview of observing events and times,
 - 2.1.5.2. Physical layout of department/program/service area,
 - 2.1.5.3. Safety training, including use of Personal Protective Equipment (PPE) as applicable, and
 - 2.1.5.4. Any applicable departmental policies or procedures.
- 2.1.6. Ensure that the Observer is under the responsibility of a LHSC staff or affiliate at all times.

2.2. The Observer will:

- 2.2.1. Wear ID badge at all times and PPE when appropriate, while in the organization (or recognized educational/organizational ID).
- 2.2.2. Respect that unforeseen events may interfere with the Observership, and in this case, the Observer will recognize that his/her Observership may be terminated at the request of the Sponsor, other leaders in the department or the organization.

3. Last Day of Observership

3.1. The Sponsor will:

- 3.1.1. Ensure that the LHSC visitor badge is returned upon completion of Observership, and
- 3.1.2. Where desired, obtain feedback/evaluation from the Observer regarding his/her overall experience to ensure on-going positive relations and quality assurance.

DEFINITIONS

Affiliates – Individuals who are not employed by the organization but perform specific tasks at or for the organization, including:

- Credentialed Professional Staff with a hospital appointment (e.g. physicians, midwives, dentists),
- Students,
- Volunteers,
- Contractors or contracted workers who may be members of a third party contract or under direct contract with the organization, and
- Individuals working at the organization but funded through an external source.

Observer – An individual attending at the organization for the specific purpose of gaining knowledge and expertise about health care and/or the functioning of the organization. An Observer may be:

- Medical professionals from other hospitals,
- Nursing professionals from other hospitals,
- Allied health professionals from other hospitals, or
- Other individuals not affiliated with the organization.

The following individuals are **not considered Observers** and are managed through alternative processes/policies - refer to the appropriate department/policy for information on having such individuals attend at LHSC:

- Students, residents/fellows or research fellows completing an educational placement at the organization as part of a program offered by an educational institution affiliated with the organization,
- Volunteers (See [Volunteer Services](#)),
- Employees of LHSC (See [People and Culture](#)),
- Pharmaceutical representatives, and
- Industry representatives.

Sponsor – LHSC staff or a physician, dentist, or midwife who is credentialed at LHSC.

REFERENCES

Corporate Policies

[Non-Medical Student & On-Site Faculty
Industry Representatives
Photography, Video and Sound Recording](#)

Other References

[LHSC Code of Conduct](#)

APPENDICES

Appendix A – [Observer Request Form](#)

Appendix B – [Observer Privacy and Confidentiality Agreement](#)

Appendix C – [Medical and Non-Medical Observers - Self-Screening Health Evaluation](#)

Appendix D – [Infection Prevention and Control Core Competency Training](#)