



SHADOWING POLICY (MD PROGRAM)

Departmental Policy

Authorizing Unit Undergraduate Medical Education Committee (UMEC)	Table of Contents: Purpose 1 Scope 2 Definitions 3 Policy Statement 4 Responsibilities 5 Procedures 6 Instructions and Forms 7 Standards 8 History 9 Relevant Related Documents 10
Classification Academic Operations	
Approval Authority Associate Dean, Undergraduate Medical Education	
Implementation Authority Manager, Undergraduate Medical Education	
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- Purpose**
- 1.1** The Undergraduate Medical Education (**UME**) program recognizes that shadowing is a valuable component of career discovery for medical students. The UME supports students who shadow for the purpose of learning, exposure to new specialties, and self-reflection for decision-making regarding clerkship electives and career trajectory. The UME views shadowing as a potentially useful adjunct to curricular elements aimed to facilitate career choice, such as Family Medicine Clinical Experience and Career Exploration.
 - 1.2** Shadowing is not a requirement of students and is not part of a student’s Canadian Resident Matching Services (**CaRMS**) application. As shadowing is for career discipline exposure, it should not be used to repeatedly shadow the same specialty. While some students may want to shadow in order to narrow down their interests, others may not feel the need to shadow.
 - 1.3** Shadowing a physician preceptor is a privilege and is not a required element of the medical student’s education. Those students who do shadow should not abuse this privilege, nor their physician preceptors’ time.

- 1.4** Shadowing should not be prioritized over curriculum requirements, wellness, or health. As such, the UME recommends that students shadow no more than once per month, and guard against hampering their wellness by excessive shadowing, particularly during curricular breaks and holidays.
- 1.5** The purpose of this policy is to support students in their shadowing endeavors, given that shadowing is a useful tool that helps students decide on the area of medicine they would like to pursue.
- 1.6** The scope of this policy applies to all medical students in the Medical Doctor (**MD**) program at the Cumming School of Medicine (**CSM**), University of Calgary.
- Scope** **2** This policy applies to all medical students with the Cumming School of Medicine, Undergraduate Medical Education Program.
This policy should be read in conjunction with:
- a. Alberta’s Freedom of Information and Protection of Privacy Act (FOIP Act)
 - b. University of Calgary’s Academic Regulations
 - c. University of Calgary’s protocols on disclosure of information to students and disclosure of information to third parties.
- <https://www.ucalgary.ca/registrar/student-centre/privacy-policy>
- Definitions** **3** In this policy:
- a. UME means the Undergraduate Medical Education program at the Cumming School of Medicine, University of Calgary.
 - b. “MD” means Doctor of Medicine.
 - c. Approval Authority means the office or officer responsible for approving Undergraduate Medical Education policy and procedures.
 - d. Implementing Authority means the office and officer responsible for implementing Undergraduate Medical Education policies and procedures.
 - e. Student Active Files refers to records about a current student.
 - f. Student File refers to records about a current or former medical student held by UME.
 - g. Confidential means that access to the records is limited to those with a demonstrated need to know. Information that is classified as Confidential must be stored within a controlled access system. It may be transmitted on internal networks with or without encryption. Information must be encrypted if transmitted on a public network.
 - h. Student Inactive Files refers to records about a former medical student.
 - i. Medical Student Performance Record (MSPR) letters refers to the specific document compiled by the UME Administration team in preparation for CaRMS match.
 - j. Canadian Resident Matching Service (CaRMS).
 - k. FOIP refers to Alberta’s Freedom of Information and Protection of Privacy Act.
 - l. Academic file refers to information pertaining to the MD curriculum, marks, rotation information etc.
 - m. Non-academic file refers to information of a personal nature of the medical student.

- n. UME administration refers to: Associate Dean, Assistant Deans, Manager, Curriculum & Administration, Administrative Assistants and Coordinator and Program Supervisors.
- o. Student Academic Review Committee (SARC).
- p. Student Evaluation Committee (SEC).
- q. “Pre-Clerkship” means years one and two of the MD program.
- r. “Clerkship” means the third and final academic year of medical school.
- s. “Learning Management System” means a web-based system for curriculum management in UME.
- t. “IST means Independent Study Time.
- u. “ITER” means In Training Evaluation Report, these are forms that are completed by preceptors after interacting with a student, either in a classroom (i.e. small group) or clinical setting. They can assess a variety of domains of performance, and usually also include a global rating of the Students’ performance.
- v. “Shadowing” means an informal way of learning what it is like to do a particular job, by following a physician already in the role. Shadowing is defined as outside of formal curriculum activities and is initiated by the individual student

Policy Statement	4	The Policy as outlined is to provide structure for shadowing while promoting career exploration. At the same time, this policy ensures that insurance and liability, the UME curriculum, and student wellness are prioritized.
Responsibilities	5	The UME Management will ensure all stakeholders are aware of this policy.
Procedures	6.1	Shadowing is largely limited to Pre-Clerkship students. Clerkship students are only permitted to shadow within specific parameters, as outlined below in clauses 6.9 through 6.14 below.
	6.2	All students must log all shadowing sessions with the UME in the Learning Management System prior to their shadowing session for approval. This is required for liability protection.
	6.3	The UME recommends that Pre-Clerkship students shadow no more than two half days per month. Any number of hours (1-4) will be considered as half a day. Students exceeding these numbers may be asked to meet with the Assistant Dean of Pre-Clerkship to review areas such as: academic record, career counselling, and student wellness.
	6.4	Shadowing is not permitted during mandatory curriculum hours. The only exception is if the student has an approved flex day (see 6.7 and Flex Day policy). Students may not use an excused absence to shadow. If a mandatory curricular activity becomes scheduled when a previously booked shadowing session is scheduled, the shadowing schedule must be canceled or rescheduled.
	6.5	The UME supports shadowing during all IST hours/self directed time, evenings, and weekends.

- 6.6** The UME strongly recommends that students attend to their wellness on flex days and during breaks. However, the UME recognizes that wellness is subjective and comes in many forms. Therefore, shadowing is permitted for Pre-Clerkship students on flex days and during all breaks. However, students are encouraged to limit their shadowing during breaks in order to prevent burnout.
- 6.7** Shadowing can be an observational experience or a patient “hands-on” activity with the physician preceptor’s permission and supervision. Shadowing may occur with delivery of virtual care/telehealth with the physician preceptor’s permission. Students are covered for liability under the “*Accidental Injury Coverage for Student Placements - Insurance Policy*” through the University of Calgary, Risk Management. However, this coverage is **only** in place if the student registers the shadowing experience in the learning management system.
- 6.8** Clerkship students will be allowed to shadow in specific circumstances with specific limitations. Shadowing will be allowed:
- a) For students with a change in career plans where other elective experiences cannot be arranged to support them with clinical exposure to assist application to a residency program.
 - b) For students interested in clinical exposure to disciplines that they have not seen through clerkship electives.
 - c) Not intended for students to have additional clinical experiences in disciplines that they will already experience through electives.
- 6.9** As in Pre-Clerkship shadowing, in order to have liability coverage, Clerkship students must register their shadowing plan with UME for approval. Prior to completing shadowing:
- a) Students should contact the UME Assistant Dean Clerkship to discuss a shadowing request prior to registering a shadowing event.
- 6.10** As in Pre-Clerkship shadowing, Clerkship students will be allowed to participate in patient care, with the physician preceptor’s supervision.
- 6.11** Clerkship students may not exceed the weekly work hour and/or call restrictions with shadowing hours - therefore, shadowing will not be available when students are on rotations where they already fill the maximum hours or call shifts allowed; shadowing may not replace scheduled clerkship activities.
- 6.12** Clerkship shadowing will not have a formal evaluation (exam, ITER) required.

- 6.13** Clerkship students arranging a shadowing experience will follow the following process:
- a) Student emails Assistant Dean Clerkship with shadowing request and reason.
 - b) The Assistant Dean Clerkship approves shadowing, if:
 - i) Student is on a rotation where shadowing will not exceed hours/call restrictions, and;
 - ii) Rationale for shadowing meets guidelines above.
 - c) The Assistant Dean Clerkship notifies the Program Supervisor.
 - d) The Student identifies to UME the name of the physician preceptor, discipline and/or clinical service, date/time of shadowing and location of shadowing (learning management system form will be completed by UME on behalf of the student).
 - e) UME checks whether that site/time/location/clinical service will have other clerks who may be impacted.
 - f) If no significant impacts are found, UME approves the proposed shadowing experience.

**Instructions
and Forms**

- 7.1** Immunization records, police checks and vulnerable sector searches are done on admission to the MD program and do not need to be repeated for shadowing or clinical rotations.
- 7.2** Students are responsible for contacting physician preceptors and scheduling shadowing sessions.
- 7.3** Pre-Clerkship students may shadow a resident physician who is agreeable, with the consent of the resident's supervising physician.
- 7.4** In the case of shadowing a resident, the resident's supervising physician holds responsibility for the student.
- 7.5** Physician preceptor and student participation is voluntary.
- 7.6** Once students have found a physician preceptor, they are required to log their shadowing session on the learning management system under the "More" tab, then "Shadow". A student who does not log their shadowing session with the UME will not have the appropriate liability coverage. Shadowing without liability coverage is unprofessional and puts patients, students, and physician preceptors at risk. Students who are non-compliant with this policy will meet with the Assistant/Associate Dean. Students will not be able to log shadowing sessions on more than one day per month during non-mandatory sessions. Students who believe they should be allowed to shadow but cannot log it due to a scheduling issue should contact the UME.
- 7.7** At all times, students are expected to follow the "[*Student Code of Conduct*](#)".
- 7.8** Students are to be directly supervised by their physician preceptor at all times.
- 7.9** No evaluations are collected by the UME office.

- 7.10** Students must wear their ID badges and professional attire in all clinical settings. White coats are at the discretion of the physician preceptor.
- 7.11** Students must use appropriate infection prevention strategies at all times.
- 7.12** Students must review the following AHS Policies:
- a) Hand Hygiene Procedure: [Hand Hygiene Policy PS-02 \(ahsnet.ca\)](http://www.ahsnet.ca)
 - b) Personal Protective Equipment:
<http://www.albertahealthservices.ca/info/page6422.aspx>
 - c) Needle stick and Sharps Injuries:
http://www.ccohs.ca/oshanswers/diseases/needlestick_injuries.html
 - d) AHS Privacy Training: <https://www.albertahealthservices.ca/info/page3962.aspx>
- Standards** **8** If an incident does occur, all accidents and safety issues must follow the UME policy: *[“Student Accident and Incident Reporting”](#)* policy.
- History** **9** Revised: Undergraduate Medical Education Management: June 27, 2023
Approved by Undergraduate Medical Education Committee: November 20, 2015
- Relevant
Related
Documents** **10** CSM - UME - *Liability Coverage for Shadowing Experience and Letter of Good Standing*
CSM - UME - [Student Accident and Incident Reporting Policy](#) - Departmental Policy
CSM - UME - [Student Code of Conduct](#)
UofC - Risk Management - *Accidental Injury Coverage for Student Placements Insurance Policy*