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# UNIVERSITY OF MIAMI HEALTH SYSTEM

## CLINICAL OBSERVERSHIP PROGRAM HANDBOOK



## Purpose

This handbook outlines the guidelines and expectations for individuals participating in the Clinical Observership (“Observership”) Program at the University of Miami Health System (“UHealth”). The program is designed to provide valuable educational experiences and insights into the healthcare field. However, it is important to note that observer participation must not negatively impact patient care or the academic environment.

## About UHealth

The University of Miami Health System delivers leading-edge patient care by the region's best doctors, powered by the groundbreaking research and medical education of the University of Miami Leonard M. Miller School of Medicine. As South Florida's only university system, UHealth is a vital component of the community.

UHealth combines patient care, research, and education to create a front-line approach to health care. Within the UHealth system, patients can participate in clinical trials and benefit from the latest developments that are fast-tracked from the laboratory to the bedside.

## Mission & Values

The mission of the University of Miami Health System and Leonard M. Miller School of Medicine is to be a state-of-the-art academic medical center that serves the South Florida community and beyond.

This will be accomplished by:

- Delivering high-quality, compassionate health care
- Leading life-changing discoveries and transforming patient care through innovative research
- Educating the next generation of medical leaders
- Promoting the health and well-being of our community
- Nurturing diversity, equity, and inclusivity

## OBSERVER PROGRAM

The UHealth Observer Program offers a valuable opportunity to gain firsthand clinical experience. By shadowing experienced healthcare professionals, observers can learn about various medical specialties



and patient care practices. However, it's important to note that observers are strictly prohibited from direct patient care.

## Program Overview and Scope

This program offers educational exposure and is not intended to provide formal training, academic credit, licensure, or board certification. Participation is voluntary and does not constitute employment. All observers must adhere to strict guidelines and regulations, with patient safety and confidentiality as paramount priorities.

This program is specifically designed for observerships within University of Miami Health System (UHealth) facilities.

Individuals seeking observership opportunities at **Jackson Health System (JHS)** must apply through JHS's separate process; please direct inquiries to [jhs-observership-program@jhsmiami.org](mailto:jhs-observership-program@jhsmiami.org).

For more information, please contact medical staff services to 305-689-5407 or email UMHC Med Staff Communications to [umhmso@miami.edu](mailto:umhmso@miami.edu).

## Program Eligibility & Requirements

### Who Can Observe?

Observers may include high school students, pre-medical students, nursing students, pre-health students, healthcare professionals from other fields, or individuals exploring a career in healthcare.

### Age Requirements:

- Minimum age: 17 years old
- Some clinical areas or departments may have specific age requirements (e.g., 18 years old). Please refer to additional application requirements for underage applicants.

### Requirements for All Observers:

- Successful completion of a background check and health screening (please see below for more information).
- Adherence to a maximum observation period of 3 months per calendar year.

## How to Apply:

To ensure a timely and smooth process, the completed application form, including necessary supporting documentation, must be submitted at least three weeks prior to the anticipated start date of the observership. This deadline is firm and essential for the proper initiation of the observership.

1. **Identify Sponsor:** Determine your area of interest within healthcare. Then, identify a faculty member or healthcare professional in that specific field who can sponsor your observership. Coordinate with your sponsor to finalize the details of your observership.

**Important Reminder:** Please ensure you have a confirmed sponsor **before** initiating the online application process. Applications submitted without a confirmed sponsor will not be accepted.

2. **Review Program Guidelines:** Familiarize yourself with the program's policies and procedures by reviewing the program handbook.
3. **Observership Requirements (After Securing a Sponsor):** To successfully participate in the observership program, please complete the following steps and submit all required documents with your online application:
  - Online Application Form:** Access and complete the online application form.  
Link: <https://umiami.vsyslive.com/pages/app/observer>
  - C Number and Cane ID Creation:**
    - Create a C Number and Cane ID through the University of Miami Identity Management system: [<https://umidm.miami.edu/Admin/caneidregistration/>]  
**Important:** Record your C Number and Cane ID, as you will need to provide them on the application.
  - Background Screening and Consent Form:**
    - Level 1 Screening: Required for all observers participating in rotations exceeding two weeks.
    - Level 1 & Level 2 Screening: Required for observers participating in rotations within designated "Vulnerable Population Programs."
    - Complete and submit the appropriate Background Screening Consent Form.
  - Mandatory Training (Cornerstone Account):**
    - You'll need to create a Cornerstone Account to proceed. We'll email you the instructions once certain preliminary steps in the process are complete.

- Once your Cornerstone account is created and your application receives approval, you must complete the following mandatory training modules. You'll need to submit the certification of completion for these modules along with your online application.
    - HIPAA Privacy & Security Awareness Training,
    - General Compliance Program Training,
    - Business Conduct and Ethical Standards, and
    - OSHA's Bloodborne Pathogens, Biomedical Waste, Latex Allergy and TB Training
  - **Media Consent Form:** Complete and submit the media consent form with your online application.
  - **Confidentiality and Security Agreement:** Complete and submit the Confidentiality and Security Agreement with your online application.
  - **Health Requirements:** Submit all required health documentation with your online application.
  - **Government-Issued Identification:** Submit a copy of your government-issued identification with your online application.
  - **Curriculum Vitae (CV) or Resume:** Submit your CV or Resume with your online application.
4. **Consider Capacity Limitations:** Please note that due to limited capacity, observer placement may be subject to availability within specific departments.
  5. **Request Accommodations:** If you require any accommodations, please inform us in advance.
  6. **Departmental Requirements:** Some departments may have additional specific requirements. Please contact the designated point of contact for further information.

#### **Underage Applicants:**

##### *Additional Requirements for Underage Applicants (17 years of age or older):*

- To ensure appropriate supervision and safety, underage observers are required to participate in the program in pairs. They must work in partnership with another observer throughout their observership.
- Written parental consent and release are required with your online application.
- Background Screening Consent with your online application.
- Underage students must provide a letter from their current high school, on official letterhead, verifying their enrollment and good standing with your online application.



- A sponsor with a level 2 background screening is mandatory.
- Observation in operating rooms and procedural areas is not permitted.

## UHealth Employees:

- Employees not directly involved in patient care activities as part of their regular job duties may be eligible to participate in the observership program.
- Observerships for UHealth employees must be approved by both the employee's immediate supervisor and sponsoring physician.
- Observations must not interfere with the employee's primary job responsibilities or scheduled work hours.
- Departments have the discretion to allow or decline employee observerships.
- Employees must complete the observership application and meet requirements.  
**Note:** Many of the required information may already be on file due to the employee's existing employment with UHealth, such as background screening and health requirements.
- The employee will then follow the established process for clearance to observe.

## Global Observership Program

MSOM departments that wish to invite and host an international observer and foreign nationals that wish to be hosted for an international observership at Miller School of Medicine (MSOM) should contact the International Medicine Institute for further information.

For more information, please visit <https://med.miami.edu/centers-and-institutes/international-medicine-institute/education-and-training/global-observership>.

## Research Observership Program

The Office of Faculty Affairs & Professional Development oversees the application process for the Research Observership Program.

For more information, please visit <https://med.miami.edu/offices/faculty-affairs/services/observerships>.

## ADMINISTRATIVE FEE

While we do not charge an administrative fee for the Observership Program, please be aware that some clinical department/program may impose a fee. Please contact the specific department directly to inquire about any potential fees.

## GUIDELINES & EXPECTATIONS

### Observer Responsibilities:

1. Observer must adhere to all facility policies, procedures, and guidelines.
2. Observers may participate in grand rounds, seminars, or other didactic activities.
3. Observers are not permitted to participate in patient care or handle medical equipment.
  - a. Including but not limited to taking medical history, performing physical examination, diagnosing and treating patient's condition, prescribing and administering drugs, writing notes or orders in patient's chart, performing and assisting in a procedure, or billing for services rendered.
  - b. Observers may be present during case discussions but may not directly participate in case advisement and under no circumstances should discuss any patient seen or encountered (this includes verbal, written, and electronic communication).
  - c. Independent patient contact is absolutely prohibited.
4. Observers must wear a visible identification badge provided by the UHealth. Before observing any patient encounter or procedure, observers must identify themselves to the patient and obtain explicit consent. Observers must adhere to patient confidentiality and privacy regulations at all times.
  - a. Patients have the right to refuse to have an observer present during examinations and discussions. If a patient refuses to permit an observer to be present during examinations and discussions, the request must be honored.
5. An observer may not behave or speak in any manner that would lead a patient to believe that she/he is a practicing clinician at UHealth.
6. Observers must always conduct themselves in a professional manner, including dressing appropriately and avoiding disruptive behavior.
7. Any incidents or concerns should be reported immediately to a staff member or supervisor.
8. Observers must avoid discussing patient information with anyone outside of the clinical setting.



9. Observer agrees not to post or otherwise engage on social media with any information, photos, voice recordings, videos or other recoding of any kind relating to any patient identifiable information of any kind, including but not limited to PHI as defined by HIPAA (45 C.F.R. Section 160.103) and PII (which means any information that can be used to distinguish or trace an individual's identity, either alone or when combined with other personal or identifying information that is linked or linkable to a specific individual).
10. Observer agrees that no photos, voice recordings, videos or other recoding of any kind shall be taken by observer when in patient areas or areas containing patient data.
11. Observers are not authorized to access computer codes or electronic health records.
12. Observers may not participate if they are experiencing any flu or flu-like symptoms or symptoms of any other contagious illness.
13. Observers must wear a UHealth-issued ID badge at all times while on campus or within UHealth facilities.
14. UHealth-issued ID badge must be returned to the designated location at the end of the observership.
15. UHealth reserves the right to terminate the observership at any time, without prior notice, if the observer fails to adhere to the program's policies and procedures, engages in unprofessional behavior, or disrupts the operations of the University of Miami Health System.

## Sponsor/Supervisor ("Sponsor") Responsibilities:

1. Co-sign the program application.
2. Supervise the participant within the guidelines specified in this handbook.
3. Assume responsibility for the behavior of the participant while on campus.
4. Ensure the participant is under the direct supervision of only those clinicians listed on this application
5. All observers will function under the direct supervision of their sponsoring clinician.
6. Sponsor must ensure that observers are limited to an observation-only role. No hands-on patient contact or care is permitted.
7. Before engaging a patient, sponsoring clinicians must identify the observer and obtain the patient's consent for their presence. If the patient declines, the observer must refrain from shadowing in that case.
8. Observers may not directly access patient medical records. Read-only access and review of patient information should be done collaboratively with the sponsoring clinician, and only when necessary.



9. Sponsoring clinicians will not provide observers with computer logins or access codes.
10. Sponsor takes full responsibility for the observer in the clinical or research environment and ensures that the observer adheres to policies and procedures.
11. Sponsor ensures the observer's safety and well-being throughout the shadowing experience.
12. Sponsor provides guidance and answers questions related to the observer's role and the clinical setting.
13. Sponsor may evaluate the observer's performance and provide feedback at the end of the shadowing experience.
14. Sponsor will be responsible for providing or arranging orientation and supervision of the observer.
15. Observers must be oriented. They must be informed of and agree to comply with organizational policies and procedures.

## IDENTIFICATION (ID) BADGES

Observers will be issued a temporary identification badge, for which a fee applies, valid for the program's duration. This badge must be visibly displayed at all times on university premises. Upon program completion, observers are responsible for returning the badge to the Security Office. A \$25 replacement fee, charged to the sponsoring department, will apply for unreturned badges.

All individuals on the Medical Campus are required to wear a University-issued Campus ID Card/Badge visibly. Access may be denied by Security Personnel if a valid ID is not displayed. University policy strictly forbids unauthorized possession of Campus ID Cards/Badges.

For further details, refer to the Public Safety website: [[IDs & Access Miller School of Medicine](#)]

## CODE OF CONDUCT

Observers must adhere to a high standard of professional conduct, including respecting patient confidentiality, refraining from harassment or discriminatory behavior, and avoiding any conduct that could harm or intimidate others. Additionally, UHealth facilities are tobacco-free, and the use of tobacco products is strictly prohibited on campus.

## HEALTH REQUIREMENTS:

- UHealth is committed to maintaining a healthy and safe environment for all. To ensure a safe environment for all, a comprehensive Health Screening and Vaccination Program is in place.
- This program requires all personnel and visitors to undergo health screenings to identify and mitigate potential health risks. Health screening must comply with the state, county health department, and the hospital requirements.
- To ensure the health and safety of all, observers must provide documentation of the following required immunizations to the Employee Health Department:

Type:	Description:	Requirements:
Immunization	MMR (Measles, Mumps and Rubella)	Documentation of proof of immunization must be an official record from a physician, previous employer or school.
Immunization	Varicella	Documentation of proof of immunization must be an official record from a physician, previous employer or school.
Immunization	Hepatitis B	Documentation of proof of immunization must be an official record from a physician, previous employer or school.
Immunization	Tuberculosis (TB)	Documentation of proof of immunization must be an official record from a physician, previous employer or school.
Vaccine	Influenza	If you are <b>not</b> vaccinated, you are required to mask in the clinical setting throughout the designated season.
Health Screening	Drug Screening	To ensure compliance, observerships that last longer than 30 days will require drug screening, which will be administered by the Employee Health Department.

- Documentation of proof of immunity must be an official record from a physician, previous employer or school. **Please note that this documentation must be submitted prior to the start of the observership.**
- All observers are required to provide documentation of immunization records.
  - If immunization records cannot be provided, titer tests will be conducted.
- To ensure compliance, observerships that last longer than 30 days will require drug screening, which will be administered by the Employee Health Department.



- Questions regarding vaccine requirements, immunization policies, and related inquiries should be directed to the Employee Health Department. You can reach them at 305-243-6638 (option 3).

## Parking, Lodging & Meals

- Observers are responsible for their own transportation and parking arrangements. Please refer to the [Public Safety](#) website for information on parking options, rates, and locations on campus.
- Observers are responsible for securing their own lodging and meals.

## Alternative Application Procedures: Paper Submissions

While we strive to maintain uninterrupted access to our online application system, we understand that unforeseen technical issues can occur. In such instances, or in specific cases where digital submission isn't feasible, a paper application process may be available.

It is critical to understand that regardless of the submission method (online or paper), the underlying policies, application process, and all submission requirements remain the same.

We are committed to ensuring a smooth application process for all observers, regardless of technical circumstances. If you have any questions regarding the paper application process, please do not hesitate to contact us.

## TERMINATION OF OBSERVERSHIP:

UHealth reserves the right to terminate the observership at any time, without prior notice, if the observer fails to adhere to the program's policies and procedures, engages in unprofessional behavior, or disrupts the operations of the University of Miami Health System.