

UTHA Observer & Learner Process

Summary

As a teaching system, UT Health Austin welcomes approved visitors who wish to gain valuable learning experiences within our clinical environment. For the safety and confidentiality of UT Health Austin patients and for operational efficiency we require anyone allowed inside clinical areas to initially complete the UTHA Access Approval Process for Learners or Observers.

- **Learners** are defined as medical or allied health care students enrolled in a DMS/UT Allied Health program who are interested in cultivating a comprehensive understanding of the UT healthcare ecosystem and patient care practices. Learners may require access to the Electronic Health Record (EHR) and will potentially interact with UT Health Austin patients during their time in the clinical spaces.
- **Observers** are individuals interested in shadowing in a clinical space to learn about how clinics function from an operational standpoint. An Observer does not represent an IRB-approved research study team as a “Researcher” and is not considered a “Learner” requiring access to clinical applications (EHR).

Observer Approval Process

- ☐ UT Health Austin Sponsor Approval - Email from UTHA Leader to DellMedHR@austin.utexas.edu
- ☐ [Observer Request Form](#)
- ☐ UTHA HR Background Check
 - You'll get an email from HR.
 - Consider: Will the guest or sponsor pay for the background check?
- ☐ UT Volunteer Packet
 - Assignment & Summary of Duties - *Volunteer Packet*, in [HR Box Link 1](#)
 - Copyright Agreement - Volunteer Packet, in [HR Box Link 1](#)
 - Personal Equipment Liability Waiver- Volunteer Packet, in [HR Box Link 1](#)
 - Photo Release Form- Volunteer Packet, in [HR Box Link 1](#)
 - UT Health Austin Confidentiality Agreement - Volunteer Packet, in [HR Box Link 1](#)
- ☐ HIPAA
 - UT Health Austin HIPAA Training Video - HR Sends Video Link via Email
 - Take & Pass UT Health Austin [HIPAA Training Quiz](#)
 - UT Workforce Member Agreement - [Use HR Box Link 1](#)
- ☐ Immunizations
 - ☐ UT Health Austin (Worklife) Immunization Verification - Ask Worklife worklife@austin.utexas.edu to send HR an Email Verification/Use Checklist from [HR Box Link 2](#)
- ☐ UT Health Austin Companion Badge - Pick Up from HTB, 10th Floor Reception or Clinical Programs Office
- ☐ UT Health Austin Bio Data Sheet - [Use HR Box Link 2](#)

Tour Guest Approval Process

- ☐ UT Health Austin Sponsor Approval - Email from UTHA Leader to rebecca.vasquez@austin.utexas.edu
- ☐ [Tour Guest Request Form](#)
- ☐ UT Health Austin Confidentiality Agreement - Volunteer Packet, in [HR Box Link 1](#)
- ☐ UT Health Austin Companion Badge - Pick Up from HTB, Clinical Programs Office

Learner Approval Process

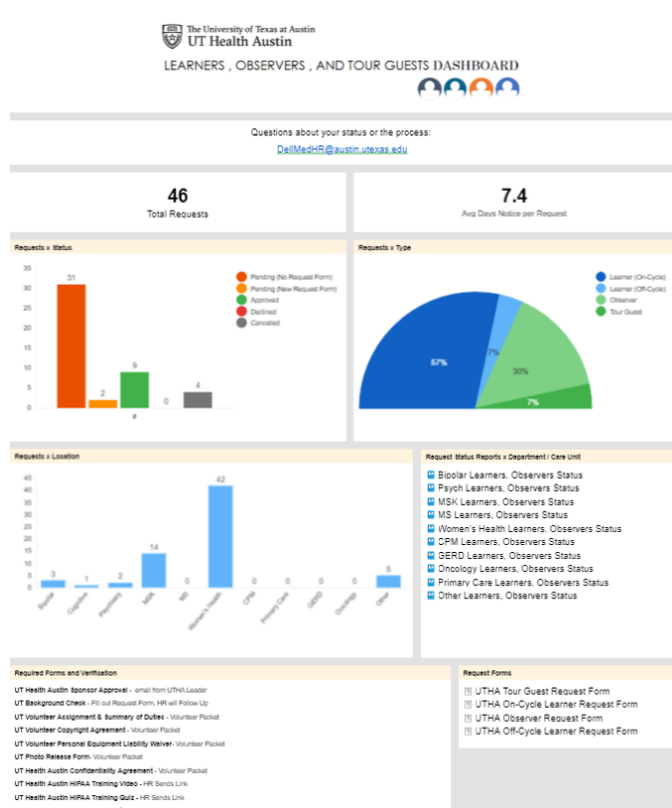
- ☐ Fill out appropriate Online Request Form
 1. [Off-Cycle Learner Request Form](#)
 2. On-Cycle Learner Request Form - Pre-arranged via Clinical Programs Office
- ☐ UT Volunteer Packet
 - Assignment & Summary of Duties - *Volunteer Packet*, in [HR Box Link 1](#)
 - Copyright Agreement - Volunteer Packet, in [HR Box Link 1](#)
 - Personal Equipment Liability Waiver- Volunteer Packet, in [HR Box Link 1](#)
 - Photo Release Form- Volunteer Packet, in [HR Box Link 1](#)
 - UT Health Austin Confidentiality Agreement - Volunteer Packet, in [HR Box Link 1](#)
- ☐ Dell Medical School Program Attestation Form for On-Cycle Learners Only
- ☐ EHR ([Learners Only](#))
 - UT Health Austin Clinical Applications EHR Training - Clinical Apps will reach out after request form receipt
- ☐

Check Request Status by Clinical Care Unit

- [Bipolar Learner/Observer Requests](#)
- [Comprehensive Pain Management Learner/Observer Requests](#)
- [GERD Learner Observer Requests](#)
- [Wome's Health Learner/Observer Requests](#)
- [MS Learner/Observer Requests](#)
- [MSK Learner/Observer Requests](#)
- [Oncology Learner/Observer Requests](#)
- [Psych Learner/Observer Requests](#)
- [Primary Care Learner/Observer Requests](#)

Learner Observer Dashboard

To track process efficiency and keep everyone up to date, this Wiki page and the metrics dashboard linked in the image below are available to all.



30-60 Days Notice

Patience and planning ahead will help as it takes the various administrative personnel at UTHA/DMS between 30-60 days to process a request.

Expect response lag at beginning of each semester.

"Volunteer Packet"

Confusing packet title. No these aren't volunteers but to UT they are unpaid and volunteer materials apply to UTHA Learners, Observers, and Tour Guests

PHI Caution* Immunizations via Worklife

Requesters should have Learners, Observers go through Worklife (worklife@austin.utexas.edu) to verify immunizations. Immunization records should never be sent directly to HR, especially not without a signed release of information form.

Companion Badges

Everyone must wear an ID badge while in the building and return their badge when their time at UTHA ends.



Related Policies & Procedures

- The [Learner-Observer Standard Operating Procedure \(S.O.P.\) document](#)
- The Learner-Observer Administrative Policy is *under review*

Questions, Comments, Suggestions

For questions or suggestions about the UT Health Austin Learner-Observer S.O.P. please contact Bex Vasquez in UT Health Austin Clinical Programs Office or Becky Parker in Human Resources.