January 2019

TO: Working Party Participants
FR: Frederick Chen, MD, MPH
RE: STFM Update on Preceptor Expansion Action Plan: Student Documentation Effort

Key Questions for Discussion:

- What policies has your institution implemented to embrace the revised CMS student documentation guidelines? How can the family work together to spread these policies to institutions that may be more reluctant to move forward with the documentation change?

FOCUS OF DISCUSSION AT WORKING PARTY: Tactic 1: Work with CMS to Revise Student Documentation Guidelines

This team’s task was to explore ways to revise the student documentation guidelines to help relieve unnecessary administrative burdens on preceptors and increase the active learning of students.

On February 2, 2018, CMS released a revised transmittal, Pub 100-04 Medicare Claims Processing Manual (updated May 31), that “allows the teaching physician to verify in the medical record any student documentation of components of E/M services, rather than redocumenting the work.”

The team continues to advocate for making the guidelines more inclusive of physician assistants and nurse practitioners.

BACKGROUND

Preceptor Expansion Action Plan
STFM is leading a multi-year interprofessional, interdisciplinary initiative to address the shortage of high-quality clinical training sites for students.

Status of Other Preceptor Initiative Tactics:
Five tactic teams, under the direction of an Oversight Committee, are implementing projects to meet the goals.

Initiative Goals:
- Decrease the percentage of primary care clerkship directors who report difficulty finding clinical preceptor sites.
- Increase the percentage of students completing clerkships at high-functioning sites.

Tactic 1: Work with CMS to revise student documentation guidelines. See description above.

Tactic 2: Integrate interprofessional/interdisciplinary education into ambulatory primary care settings through integrated clinical clerkships
This tactic explores a means to increase the number of learners at a given site without putting more pressure on the clinician’s shoulders. This means transforming education, in conjunction with the practice, away from the 1:1 preceptor/student model.
The team has identified a comprehensive list of opportunities where students could be integrated in useful ways into clinical practice workflows. The list/workflows highlight areas and processes that could accommodate multiple and/or interprofessional students. The workflows will be vetted with preceptors and then translated into implementation tools.

This project is being led by the Physician Assistant Education Association (PAEA).

Tactic 3: Develop standardized onboarding process for students and preceptors & Integrate students into the work of ambulatory primary care settings in useful and authentic ways

The team is developing student onboarding resources and processes that will include:
- A student passport that captures a student's training, screenings, clerkship background, objectives for the current clerkship, and basic information about the student
- Education for students on how to hit the ground running at their clerkship site
- Three online training modules for students: "How to Create a High-Quality and Billable Note in the Medical Record," "How to Perform Medication Reconciliations," and "Motivational Interviewing."
- Promotion of curriculum to meet goals and objectives outlined in the appendix of the AAMC’s Recommendations for Preclerkship Clinical Skills Education for Undergraduate Medical Education

The team is developing preceptor onboarding and processes that will include:
- Use of the AAMC Uniform Clinical Training Affiliation Agreement with preceptors
- A faculty appointment onboarding process where administrative personnel at the institution assist new preceptors in developing and formatting CVs during a phone interview
- An online STFM course on Giving Feedback

These resources and processes will be piloted as part of Tactic 4. The pilot begins in early 2019.

Tactic 4: Develop educational collaboratives across departments, specialties, professions, and institutions to improve administrative efficiencies

In early 2019, the Tactic 4 team will launch a multi-year pilot, funded by the American Board of Family Medicine, called Building Better Clinical Training Experiences: A Learning Collaborative. During the pilot, family medicine departments will participate in one of three projects to implement, evaluate, and disseminate innovative approaches to standardize the onboarding of students and to engage community preceptors.

Five family medicine departments will be selected for each of the three projects through a competitive application process. Preference will be given to departments collaborating with two or more other specialties/departments/professions. Over the next two years, departments and their collaborators will test the materials and processes being developed as part of Tactic 3, as well as recognition and incentive programs being developed as part of Tactic 5. The teams will participate in online and in-person learning communities to share/learn about intervention approaches; conduct standardized pre/post measurement; and disseminate their findings. A call for applications for the pilot will open in January 2019. This tactic is being funded by the American Board of Family Medicine Foundation.

Tactic 5: Promote Productivity Incentive Plans That Include Teaching & Develop a Culture of Teaching in Clinical Settings
The unifying theme of the tactics under this umbrella is creating the incentives and culture needed to expand the pool of preceptors. The target audience for these efforts is the health systems that employ community preceptors.

Competencies and incentives for community faculty have been developed in collaboration with the STFM Faculty Development Collaborative, and will be piloted through the Tactic 4 pilot.

On April 2, 2018, STFM and the ABFM kicked off a pilot program that offers Performance Improvement continuing certification credit (previously MOC Part IV) to ABFM diplomates who provide personal instruction, training, and supervision to a medical student or resident and who participate in a teaching improvement activity. The pilot ends on December 3, 2018. The Precepting Performance Improvement Program will be tweaked, based on lessons learned in the pilot, and rolled out broadly. This program will be highlighted as part of the Wicked Problem discussion on administrative burden at the January 2019 Working Party. See separate document for more background.

This initiative stemmed from Family Medicine for America’s Health’s Workforce Education and Development Core Team’s task to identify, develop, and disseminate resources for community preceptors. The work is being funded by STFM, the ABFM Foundation, and the Physician Assistant Education Association.

Completed/Accepted Presentations:
- Easing the Load of Precepting: Efficiently Integrating Students into Ambulatory Training Sites. STFM Conference on Medical Student Education. February 2, 2019
- Promoting Effective Feedback by Clerkship Preceptors Through an ABFM/STFM Pilot Precepting Performance Improvement Activity. STFM Conference on Medical Student Ed. February 1, 2019
- Addressing the Challenges of Preceptor Development and Recruitment. STFM Conference on Medical Student Education. February 1, 2019
- Rollout of the ABFM Performance Improvement Precepting Program. STFM Conference on Medical Student Education. February 1, 2019
- Help Preceptors Earn ABFM Performance Improvement Credit With TeachingPhysician.org. STFM Conference on Medical Student Education. February 1, 2019
- A Preceptor Teaching Improvement Course: A Maintenance of Certification Pilot. STFM Conference on Medical Student Education. February 1, 2019
- Standardized Student Assessment as Part of a Pilot ABFM Performance Improvement Project. STFM Conference on Medical Student Education. February 1, 2019
- A Multiorganizational Plan to Address the Shortage of High Quality Community Preceptors. 2018 NAO Biennial Conference, July 9, 2018
- Helping to Make Students Important Members of the Team. HRSA Advisory Committee on Interdisciplinary, Community-Based Linkages Webinar. June 6, 2018.
- CMS Change in the Use of Medical Student Documentation. AAMC Webinar. June 6, 2018
- Addressing the Preceptor Crisis: Implementation of the Preceptor Expansion Action Plan and How You Can Help. STFM Annual Spring Conference. May 7, 2018
- ABFM Performance Improvement Precepting Program: A Pilot. STFM Conference on Medical Student Education. February 3, 2018
Multiorganizational Plan to Address the Shortage of High Quality Community Preceptors. STFM Conference on Medical Student Education. February 2, 2018
Six Tactics to Solve the Crisis of Community Preceptor Retention & Recruitment. AAMC Annual Meeting: Learn, Serve, Lead. November 6, 2017
HRSA Stakeholders’ Meeting. February 22, 2017

Completed/Accepted Publications

- Preceptor Expansion Initiative Takes Multi-Tactic Approach to Addressing Shortage of Clinical Training Sites. Family Medicine. February 2019
- American Board of Family Medicine Foundation Approves Grant for Preceptor Expansion Initiative. STFM Messenger. July 10, 2018
- CMS Clarifies Rule, Again Requires Preceptors to Redo Student Work. PAEA. May 9, 2018.
- New Opportunity to Receive American Board of Family Medicine Performance Improvement Credit for Teaching. UNC Healthcare. May 3, 2018
- Preceptor Expansion Oversight Committee Discusses Next Steps on CMS Guidelines and Creating Efficiencies and Incentives for Teaching. STFM Messenger. April 11, 2018
- Policy Change from the Centers for Medicare and Medicaid Services Provides an Opportunity to Improve Medical Student Education and Recruit Community Preceptors. Acad Med. Apr 10, 2018
- Preceptor Expansion Action Plan – Description and Progress Update. Family Med. April 2018
- CMS announces major change to rules on med student documentation. Legacy Health. Mar 18
- Updated E/M Documentation Rules Good for Preceptors. AAFP News Now. Feb 16, 2018
- Medicare eases burden for E/M documentation involving medical students. A blog from FPM Journal. February 9, 2018
- New CMS guidelines eliminate requirement to re-document student notes. Becker’s Hospital Review. February 7, 2018
- Revised CMS Rule Should Ease Preceptors’ Administrative Burden, Help with Recruitment. PAEA. February 7, 2018
- Stakeholder Meeting Addresses Shortage of Clinical Training Sites. PAEA. March 1, 2017
- Summit Will Address the Shortage of High-Quality Family Medicine Community Preceptors. Ann Fam Med. May/June 2016vol. 14 no. 3 282-283
- STFM to Address the Shortage of High-Quality Community Preceptors. STFM Messenger. May 13, 2016