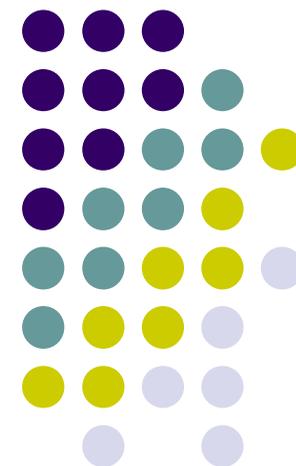


# TDSHS EMS COURSE COORDINATOR COURSE

How to NOT to Destroy Your  
Program





# Objectives

- Discuss record retention policy.
- Discuss strategies to improve course paperwork management.
- Discuss how to develop a file management system.
- Discuss buy in of instructional staff.
- Discuss advantages of web based solutions.
- Discuss methods to ensure program success.



# Records Retention

- TDSHS Record Retention Requirements
  - 4yrs +1yr
- HOWEVER
  - How long can it take a student to get certified?
  - NREMT = 2 years
    - Psychomotor valid for 1 year
      - “RENEW” or “RETEST”
    - Cognitive
      - 2 years to be successful
    - Creates a problem with 4 years plus 1
    - Solution 6 + 1 (My recommendation)

# Records Retention



- Electronic Storage
  - Everything from the course file
  - Onsite, Offsite, or Combination Storage
    - Redundant
  - Flip Through
  - Ease of accessibility

# Programs Generate Paper



- Screening tools
- Instructor credentials
- Medical director correspondence
- Student counseling statements
- Clinical affiliation agreements
- Exams
- Instructional logs
- Goals & Budget statements
- Daily rolls
- Tutoring logs
- Health & immunization records
- Clinical documentation
- Skills examinations
- Preceptor evaluations
- Program evaluations
- Graduate surveys
- General correspondence

# Paperwork NIGHTMARE



It all falls into 4 categories



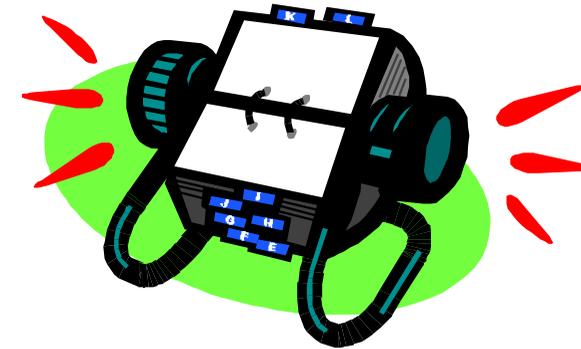
- Program Records
- Course Records
  - Student Records
- Health Records
- CE Records

	<b>Urgent</b>	<b>Not Urgent</b>
<b>Important</b>	<p><b>Quadrant 1</b></p> <p><i>Examples:</i></p> <ul style="list-style-type: none"><li>• Unscheduled rework</li><li>• Last-minute changes</li><li>• Dealing with late inputs from stakeholders, team</li><li>• Forcing decisions &amp; closure</li></ul>	<p><b>Quadrant 2</b></p> <p><i>Examples:</i></p> <ul style="list-style-type: none"><li>• Thoughtful, creative work</li><li>• High-quality outputs</li><li>• Productive collaborations</li><li>• Training &amp; development</li><li>• Recreation &amp; family time</li></ul>
<b>Not Important</b>	<p><b>Quadrant 3</b></p> <p><i>Examples:</i></p> <ul style="list-style-type: none"><li>• Low-value, but required, reports &amp; presentations</li><li>• Non-project emergencies</li><li>• Miscellaneous interruptions</li><li>• Administrivia</li></ul>	<p><b>Quadrant 4</b></p> <p><i>Examples:</i></p> <ul style="list-style-type: none"><li>• Over-analysis ("analysis-paralysis")</li><li>• Pointless web-surfing</li><li>• Gossip, idle speculation</li><li>• Self-indulgent perfectionism</li></ul>

# Program Records



- Goal statements
- Exams and quizzes
- Book reviews and adoption
- Advisory Board:
  - Members
  - Minutes
- Budget reports
- Instructors:
  - Credentials
  - Evaluations (Program and Student)
  - Teaching Log
- [TDSHS course applications](#)
- Community service projects
- [Clinical affiliation agreements](#)





# Program Records

- Instructor Records
  - Employment application
  - Copies of credentials
  - Time sheets
  - Teaching log
  - Instructor Evaluations
    - [Program Specific Tool](#): Annually
    - [TDSHS Tool](#): By Course or annually



# Student Records

- Maintained by course number
  - Correspondence
  - Exams
  - Skills testing
  - Clinical rotations
  - Counseling Statements
- TDSHS Record Retention Recommendation





# Health Records

- Separate from student files
  - [Baseline health screening](#)
  - Immunization status
  - [Exposure reports](#)
  - Tb status
- Helps student trend health status
- HIPPA
  
- TDSHS Retention Policy

# Why Maintain Health Records



- Baseline health status
- Immunization status
  - Student & patient protection
- Exposures may not become known for months
- Program acts as infection control officer if exposure occurs



# Course Records

- Syllabi
- Schedules
- Instructional Teaching Hours
  - Who taught what and when
- Staff Credentials
- Course Rolls/Attendance Logs
  - MUST BE ABLE To verify attendance
- Counseling Statements
- Skills testing
- Instructor evaluations
- Master of all exams and quizzes

# Filing System



- 3 file cabinets
  - Exams
  - Program Records
  - Current course records
- Archive old course records



# Student File

- Multiple Part File
  - General
    - Correspondence
    - Credentials
    - Information Sheet
    - Student Contract Acknowledgement
    - Counseling statements
  - Exams
  - Skills Testing/Evaluation
  - Clinical Rotations

# Archiving Records



- Course Box
  - Master Course File
    - TDSHS Submission Documents
    - Course Syllabus
    - Course Schedule
    - Course evaluation by students
    - Course roll
  - Exam File
  - Individual student file

# Misc File Management



- Database
- Emails
- Web Based Solutions
  - Paper Backup?
    - FISDAP: Skill sheet backup?
    - Certified Background
      - Document Tracker, Drug Screen, Background Check
      - Policy
      - What should you retain: Clinical Matrix
  - Must frequently review and manage: NO RONCO
- Scenarios
  - Flow, vetting, decision points, critical points, MD Approval

# Common Paperwork ERRORS



- Counseling Statements
  - Why Dropped or Clinical Suspended
- Skill Sheets
  - Time Start/Time End (Actual)
  - Examiner name and signatures
- Clinical Documentation
  - FISDAP
    - Summary sheet for each clinical
  - Student & Preceptor Signatures
  - Preceptor evaluations

# The Good, Bad and Ugly



## Bad & Ugly

- Just thrown in a box
- No filing
- Not sorted by student
- Not sorted by course
- RONCO
  - Set it and forget it!
  - The Lost Papers of .....

## Good (BEST)

- Individual Student File
  - Multipart as discussed
  - Checklist in each file for each student
- Archived by TDSHS  
Course Number and  
Date
- Master course folder in  
front



# That's NOT ALL

## Continuing Education

- Where?
  - Separate from Course File (BEST)
  - In Main Course Archive Box
- Daily File (Date, TDSHS #/Course)
  - Roster
  - Content Taught (copy of schedule at minimum)
  - Validation instrument
  - Copy of CE awarded
- Skills Renewals
- Periodic Spot Check Files

# Success in Paperwork



- Spend a minimum of 5 hours per week on paperwork once a course begins.
- The busiest time is the beginning and end of course. Plan for it.
- Pre-make student files.
- Have students complete paperwork first day of class.
- Make copies of **EVERYTHING**.

# Success in Paperwork



- Retain clinical agreements in program files with up to date contact information.
  - Review annually
- **FILE IT!!!**
- Check List (Master File and Student File)
- Use a database or other software to help track data.
  - Coordinator Companion



# Who should have access to records?



- Course coordinator
- Primary instructor for course
- Clinical coordinator
- Course medical director
- Support staff
  
- NOT OTHER STUDENTS!

# Steps to Destroy Your Program



- Customer service
  - Everyone is a customer
- Faculty Buy in
  - Policies, Grades, Curriculum, Processes
  - Comments
    - “That’s not important” or “You don’t need to know that”
- Policies & Procedures
  - Protects program and students
  - Revise, Revise, Revise
  - Stick to Them

# Steps to Destroy Your Program



- Faculty Engagement
  - Teach, Meetings, Creativity
  - Student Engagement
- Skills Instruction
  - Solid core of instructors: Go to people
  - Consistent
  - Onboarding of new staff
  - Periodic evaluation: Are they doing to right?

# Steps to Destroy Your Program



- Clinical Sites and CTA's
  - Disengaged
  - Just show up and chat with the staff instead of monitor students
  - Comments
    - “Don't worry about that stuff, you will never use that!”
- Knowledge of State and National Rules
  - CAAHEP
  - National Standards
  - State Requirements (AEMT vs EMT-I)

# Steps to Destroy Your Program



- Paperwork, Paperwork, Paperwork
  - Save it
  - File it
  - Organize it
  - Archive it
  - Find it

# Steps to Destroy Your Program

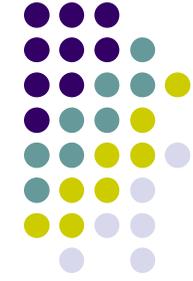


- Web Base App's
  - Not Ronco!
  - Designed to ease your burden
  - Set up and maintenance
  - Types
    - FISDAP
    - Platinum
    - Certified Background
    - eLearning tool

# Steps to Destroy Your Program



- Let's Talk
  - Rumors
  - FERPA
- Excuses Hinder Success



# Questions