
COLLABORATIVE CLINICAL AGREEMENT PROCESS USER GUIDE



November 15, 2017; Revised January 2020; Revised June 2022

TABLE OF CONTENTS

Introduction.....	3
Definition of Clinical Affiliation Agreement.....	3
Types of Affiliation Agreements Used	3
Current Systems Used	4
Committee Co-Chairs.....	5
Admin task group (ATG) members	5
Committee Members	5
Participant Roles in the Process	6
Overview of agreement process.....	7
Guideline notes for clinical Agreement Initiation.....	9
TEMPLATES - available in database	10
User Database Screens	11
URL Login page	11
Landing/Main Menu	12
Agreements	13
Sites	14
Templates	14
Reports & Queries	15

INTRODUCTION

The clinical affiliation agreement project was initiated in 2009. The project was a collaborative process among multiple healthcare and professional disciplines across campus and University of North Dakota (UND) General Counsel. The intent of the project was to create a process and document with which to initiate a legal agreement between UND and external facilities engaging in the clinical supervision of students. The effort was a review of accreditation standards and a consolidation of former agreements from the individual departments. Master agreements are becoming an industry standard and often requested by clinical facilities.

Prior to placement of UND students in a clinical experience setting, a legal agreement is required between the University and the facility. Until a fully executed agreement is received by the University, **NO STUDENT PLACEMENT WITH THE PROPOSED AFFILIATION ENTITY SHOULD OCCUR.**

DEFINITION OF CLINICAL AFFILIATION AGREEMENT

An affiliation agreement is a legally binding agreement that sets forth the terms and conditions under which the University of North Dakota and a facility/organization agree to furnish education, training, or clinical experiences that are integral to a specific institutional academic degree or course objective.

TYPES OF AFFILIATION AGREEMENTS USED

UND Master affiliation agreement (UND template—recommended agreement type)

An affiliation agreement generated by UND covering participating university departments/programs

Facility Master Affiliation agreement (facility template)

An affiliation agreement generated by the facility covering participating university departments/programs

UND Department affiliation agreement (UND template)

An affiliation agreement generated by the department covering only a specific university department.

Facility Department affiliation agreement (facility template)

An affiliation agreement generated by the facility covering only a specific university department.

CURRENT SYSTEMS USED

User Database

The User Database is a custom built web based system storing Master and Departmental agreements in a central location. Access to this system allows a user to verify or review an active clinical affiliation agreement. Members of the Master Committee on Affiliation Agreements (MCAA) committee have varying degrees of access to the user data base. Administrative Task Groups members have administrator access, designated responsible parties for clinical education within a department have limited access and other interested parties may be granted viewing access. To request access or change of status contact an administrative task group member.

See contact information on web site: [razor.med.und.edu/affiliation agreements/agreement](http://razor.med.und.edu/affiliation%20agreements/agreement); use your UND IDM log-in to access the site.

Versatile

Versatile is a records management system used to store the executed agreements and supporting documentation. All master agreements are maintained in Versatile within the School of Medicine and Health Sciences (SMHS) by the Education and Faculty Affairs office. Participating departments maintain respective departmental agreements and supporting documentation within their department utilizing the records retention guidelines.

DocuSign

DocuSign is a system utilized to communicate and electronically sign agreements. To assist with the process template memos are available in the database. Administrated by the administrative task group.

MCAA List Serve

Used to communicate changes and updates to all parties within the MCAA committee. For access to the list serve contact the administrative task group.

COMMITTEE CO-CHAIRS

The committee is Co-Chaired by a faculty member from SMHS and a faculty member outside of the SMHS. Co-Chairs are voted on by the committee of the whole for three year terms. The Administrative Task Group reports to Co-Chairs with appointments on an as needed basis with a minimum of 4 members and a maximum of 6 members. The Co-Chairs report to the primary signatures for the MCAA, currently David Relling, Associate Dean Health Sciences and Maridee Shogren, Interim Dean College of Nursing and Professional Disciplines.

Responsibilities of Co-Chairs:

- Call an annual meeting to update MCAA committee and discuss any regulatory changes in clinical education
- Provide support for administrative task group
- Provide consultative support to departments when requested

ADMIN TASK GROUP MEMBERS

Responsibilities of each member of the administrative task group is identified and agreed upon by the members and reviewed by Co-Chairs.

COMMITTEE MEMBERS

The MCAA committee of whole includes all Deans, Department Directors, and Faculty and Staff associated with clinical education agreements. A list of participating departments and programs is noted in Exhibit A of Clinical Agreement Templates. Consultative members include representation from the Office of General Counsel, Associate Director Records and Information Management, and Information Resources. A list of current committee members can be found on the website. razor.med.und.edu/affiliation_agreements/agreement; use your UND IDM log-in to access the site.

PARTICIPANT ROLES IN THE PROCESS

1. Clinical Education Departments/Programs
 - Exhibit A of MCAA provides a list of departments
 - Each department identifies designated responsible parties (DRP) for authorized reviewer(s)
 - Responsible for initiating agreements when appropriate
 - Reviews and verifies agreements
2. Education and Faculty Affairs
 - Office of record for MCAA
 - Provides administrative support
3. Records and Information Management (RIM)
 - Administers Versatile Records Information System
 - RIM Director provides consultative support related to records management and retention
4. UND Legal Counsel
 - Reviews proposed changes to the Master agreement
 - Reviews all proposed Facility agreement templates
 - Provides consultative legal support to the committee
5. Information Technology SMHS
 - Developed current database
 - Provides technical support and server space for the database
6. Authorized Signatory
 - Provide guidance to the co-chairs of the committee
 - Master Agreements require signatures of two Deans/Associate Deans
 - SMHS Dean/Associate Dean
 - CNPD Dean/Associate Dean (if the agreement is initiated by a department outside of the College of Nursing the Dean of initiating Department and designated signatory for SMHS)
 - Department Agreements
 - Follows procedure of the department/program including a signature from the department/programs Dean/Associate Dean

OVERVIEW OF AGREEMENT PROCESS

Step One: Initiation

A department may initiate a clinical agreement for a student clinical experience with a clinical site/organization. There are multiple agreement types but the preferred template is a standard UND agreement that was pre-approved by the UND legal counsel and agreement committee members. Many agreements cover multiple University departments as a master agreement, while others may pertain only to a specific department. For a department agreement, a department representative is responsible for ensuring the agreement is walked through all steps. For a master agreement, the agreement process below is followed and facilitated by an administrative task group.

Step Two: Pending

The responsible party, or initiator of the agreement, notifies the user database administrator to indicate an agreement negotiation is pending. The data base administrator will request the initiator to verify the accuracy of the agreement record in the database and then note the pending status. This step is to notify other departments to be aware of the pending agreement and not duplicate it.

Step Three: Routing

The initiator of the agreement sends the preferred UND-approved agreement to the site. If the site requests changes, the initiator should first review the changes considering the clinical application. If the changes are appropriate clinically it is routed by the initiator to UND legal counsel who will then determine the language of the agreement with the site's legal counsel if necessary. Once the language of the agreement is established, the initiator sends a copy of the agreement (with legal approval if necessary) to route the agreement through the DocuSign process. [Administrative task group contact sets up the DocuSign process for routing review and/or final signatures.]

Step Four: Signature

If any changes are made to the UND template or if a facility/site template was used, the agreement MUST be routed for DocuSign review by all participating departments. Once review signatures are obtained from all departments, the agreement is then routed through DocuSign again to those authorized to execute agreements for UND and SMHS for the final signature

Step Five: Distribution

Once final signatures are obtained, the initiator distributes the signed agreement to the site contact for their records. The initiator will also send notification and the finalized agreement, to the MCAA Listserv (to inform the members), to the database administrator (to update/load the final agreement), and to the

records information management (RIM) administrator (to file/retain in Versatile). In addition, any legal documentation is electronically sent to the RIM person for final filing and official records management.

Step Six: Retention/Storage

Upon receipt of notice of executed agreement email from the initiator, the database administrator will upload the agreement, add contacts, and any additional information to the database. The Agreement will then be moved from Pending to active status.

Step Seven: Quality Assurance

Once the agreement has been added to the database, the database administrator will email an administrative task group member to review the entry for accuracy, and an administrative task group member (RIM) to add the Versatile file number. The database administrator will also review the database to ensure any previous Master agreements that are superseded by the current agreement are made inactive or notify department(s) that a department agreement needs to be made inactive.

Personnel & Technical Contributions

To date, functions related to database management are shared by various departments for this project. The cost of the database server storage, the personnel (PT/OT/EFA) and programmers working on the project, and the cost for the DocuSign software have primarily been assumed by the SMHS.

GUIDELINE NOTES FOR CLINICAL AGREEMENT INITIATION

1. Search the user database to check for an existing or pending agreement at <https://razor.med.und.edu/affiliationagreements>
2. Determine the agreement type best to utilize (in the following order).
 - a. UND Master (preferred agreement to use)
 - b. UND Department (if a master is not necessary/facility pertains to a specialized area or profession)
 - c. FACILITY master/department (when a facility insists/prefers their template to be used).
3. Download agreement template directly from the User Database (to ensure most recent approved template is used).
4. Complete the template (it is a fillable form):
 - a. Choose the template to use and download. Select View, Open, and Enable Editing.
 - b. TAB (not mouse click) to move through the document - otherwise the form may not work properly.
 - c. Add your text than TAB to the next field to complete or clear the fillable fields.
 - d. Add facility name (use same name) in all three areas (at top, under Notices, and on signature page).
 - e. Select appropriate Authorized Signatory from the drop down boxes on the signature page.
 - f. SAVE new agreement copy to a designated location (your computer, jump drive, etc.).
 - g. REMOVE DOCUMENT PROTECTION – Only if the facility has requested to edit the agreement content. DO NOT AUTOMATICALLY REMOVE DOCUMENT PROTECTION. Removing the protection indicates the template will deviate from the legal approved content, and MUST then be routed through legal counsel and DocuSign processes. No password is used (contact an admin task group member for help if needed). If modification made to the template, you MUST edit the footer with the new/revised date. Save and send document to your contact (add redline/tracking if wanted).
 - h. If ANY changes have been made to a master agreement template, the revised agreement MUST be routed through legal counsel and DocuSign so that all participating departments have the opportunity to review/comment on any changes that may affect them.
 - i. Any changes to a department template agreement must go through legal counsel, but does not need to be routed through DocuSign (since it will not affect other departments).
 - j. For DocuSign setup, send the revised agreement document along with any pertinent documentation, and the necessary details (see sample memo template) to the designated DocuSign coordinator.
5. Email a PENDING agreement notice to the designated user data base coordinator when a new agreement negotiation begins. Include the facility name and contact information (use sample memo). This tracks the clinical agreement in the Database so other USERS are aware an agreement is in progress.
6. Route agreement to appropriate channels for legal review/approval and official signatures (suggested memo wordings available in the sample template memos).

7. At no time should an agreement be modified without the consent of both parties. Any and all changes, whether written, deleted or added to MUST BE acknowledged BY ALL PARTIES.
8. When agreement is fully executed, an email notification to the committee listserv address is sent. Attach just the agreement (do not include the legal/supporting documentation). The listserv includes all internal parties and program contacts so they are aware they can utilize the facility. Forward final documentation to the designated records information management coordinator. Send an email notification to Committee Listserv address at < undmcaa@med.und.edu >
9. Departmental agreement and documentation process is managed within each department. Designated Department contacts have access to add their respective department agreement information directly in the User Database

TEMPLATES - AVAILABLE IN DATABASE

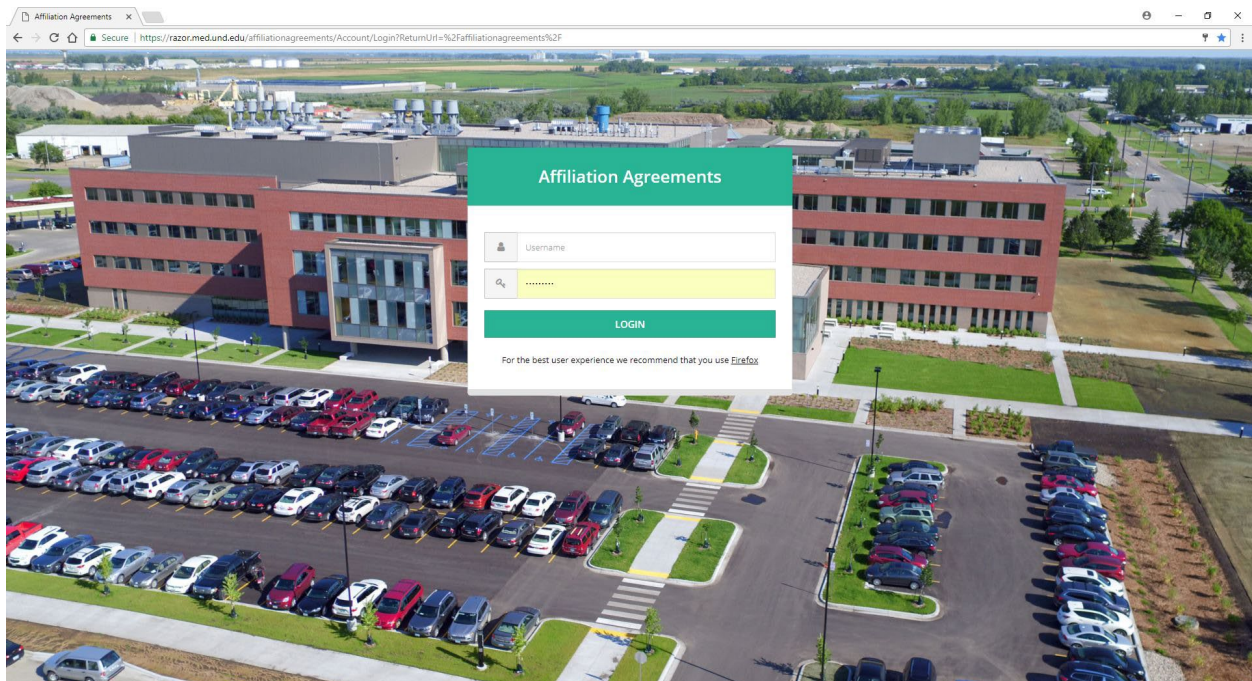
1. Master Clinical Affiliation Agreement Template
2. Departmental Clinical Affiliation Agreement Template
3. Memo Samples
4. Authorized User list

User Database Screens

URL LOGIN PAGE

Located at (using IDM username and password)

<https://razor.med.und.edu/affiliationagreements/>



LANDING/MAIN MENU

Select the Menu you want to view or utilize. Most users will choose or start with Agreements.

The screenshot shows the 'Affiliation Agreements' web application. The sidebar menu includes: Agreements, Sites, Templates, Reports & Queries, and Contact Information. The main content area displays a table of agreements with the following columns: NAME, INITIATED, LOCATION, START-END, and STATUS. The table contains 14 rows of data, including entries like '212th Medical Detachment', '23 Nutrition Therapy', '307 Health', '319 Medical Group', '360 Physical Therapy', '5th Medical Group (FNP Track)', '7-Day Clinic', 'A Balanced Mind', 'A Better Learning Environment', 'A.F. Associates Family Medicine', and 'A'vlands'.

NAME	INITIATED	LOCATION	START-END	STATUS
212th Medical Detachment Department Agreement	Nursing	APO - Armed Forces Europe.	8/20/2020 - 8/20/2025	Active
23 Nutrition Therapy Department Agreement	Nutrition & Dietetics	Berkeley, CA	5/20/2021 - 5/20/2026	Active
307 Health Department Agreement	144126 Physician Assistant	Powell, WY	1/23/2018 - 1/23/2023	Active
319 Medical Group Department Agreement	Nursing	Grand Forks AFB, ND	4/20/2011 - 4/20/2017	Archived
319 Medical Group Department Agreement	Nursing	Grand Forks AFB	8/12/2020 -	Active
319 Medical Group Department Agreement	Nursing	Grand Forks AFB, ND	8/12/2020 -	Archived
319 Medical Group (exclusions) Department Agreement	Nursing	Grand Forks AFB, ND	3/3/2017 -	Active
360 Physical Therapy Department Agreement	171798 Physical Therapy	Minot, ND	12/7/2021 - 12/7/2026	Active
5th Medical Group (FNP Track) Department Agreement	Nursing	Minot AFB, ND	4/24/2015 -	Active
7-Day Clinic Department Agreement	Nursing	Fargo, ND	12/23/2013 - 12/23/2018	Archived
A Balanced Mind Master Agreement	151776 SW Campus	Bismarck, ND	12/20/2018 - 12/20/2023	Active
A Better Learning Environment Department Agreement	Communication Sciences & Disorders	Mesa, AZ	5/1/2019 - 5/1/2024	Active
A.F. Associates Family Medicine Department Agreement	Nursing	Grand Rapids, MI	2/1/2011 -	Active
A'vlands Master Agreement	125763 Nutrition & Dietetics	Redfield, SD	9/24/2015 - 9/24/2020	Active

See pages below for more detail of the following menu features:

Agreements = will display agreements (see next page for more details)

Sites = will display a specific site and the agreement it may be covered under (if a department uses this feature)

Templates = a place to display/store resource documents and agreement templates

Reports & Queries = contains agreements report (all), agreements report (department), agreements report (master), sites report

AGREEMENTS

Select filter options to narrow down a specific category search. If you are designated to enter an agreement for your department you will have the option to add or create an entry for a new agreement. For viewing agreements:

Under Agreement Type, select drop down arrow options to display or search: All, Master, Department

In the empty far left box, start entering an agreement name or location to bring up search items

In the middle box, select drop down arrow to search by department or group.

In the far right box, select drop down arrow to search by: All, Active, Pending, Archived, Inactive

The screenshot displays the 'Affiliation Agreements' web application. The interface includes a sidebar with navigation options like 'Main Menu', 'Agreements', 'Sites', 'Templates', 'Reports & Queries', and 'Contact Information'. The main content area shows a list of agreements with the following columns: NAME, INITIATED, LOCATION, START-END, and STATUS. A search bar and filter dropdowns are visible at the top of the list.

NAME ^	INITIATED	LOCATION	START-END	STATUS
212th Medical Detachment Department Agreement	Nursing	APO - Armed Forces Europe,	8/20/2020 - 8/20/2025	Active
23 Nutrition Therapy Department Agreement	Nutrition & Dietetics	Berkeley, CA	5/20/2021 - 5/20/2026	Active
307 Health Department Agreement	144126 Physician Assistant	Powell, WY	1/23/2018 - 1/23/2023	Active
319 Medical Group Department Agreement	Nursing	Grand Forks AFB, ND	4/20/2011 - 4/20/2017	Archived
319 Medical Group Department Agreement	Nursing	Grand Forks AFB	8/12/2020 -	Active
319 Medical Group Department Agreement	Nursing	Grand Forks AFB, ND	8/12/2020 -	Archived
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5th Medical Group (FNP Track) Department Agreement	Nursing	Minot AFB, ND	4/24/2015 -	Active
7-Day Clinic Department Agreement	Nursing	Fargo, ND	12/23/2013 - 12/23/2018	Archived
A Balanced Mind Master Agreement	151776 SW Campus	Bismarck, ND	12/20/2018 - 12/20/2023	Active
A Better Learning Environment Department Agreement	Communication Sciences & Disorders	Mesa, AZ	5/1/2019 - 5/1/2024	Active
A.F. Associates Family Medicine Department Agreement	Nursing	Grand Rapids, MI	2/1/2011 -	Active
A'viands Master Agreement	125763 Nutrition & Dietetics	Redfield, SD	9/24/2015 - 9/24/2020	Active

SITES

Home > Sites
Sites

Page 1 of 4 << < Prev Next > >> Total: 50 of 194

NAME	AGREEMENT	LOCATION	STATUS
Achieve Therapy and Fitness - Demers	Achieve Therapy and Fitness	Grand Forks, ND	Active
Achieve Therapy and Fitness - EGF	Achieve Therapy and Fitness	East Grand Forks, MN	Active
Achieve Therapy and Fitness - S Columbia	Achieve Therapy and Fitness	Grand Forks, ND	Active
Altru Hospital	Altru Health System	Grand Forks, ND	Active
Altru Rehabilitation Center	Altru Health System	Grand Forks, ND	Active
Augustana Care Apple Valley Campus	Centrix Rehab	Bloomington, MN	Active
Avera Health Plans, Inc.	Avera Health	SD	Active
Avera Holy Family	Avera Health	SD	Active
Avera Marshall	Avera Health	SD	Active
Avera McKennan	Avera Health	SD	Active
Avera Queen of Peace	Avera Health	SD	Active
Avera Sacred Heart Hospital	Avera Health	SD	Active
Avera St. Anthony's	Avera Health	SD	Active
Avera St. Benedict Health	Avera Health	SD	Active
Avera St. Luke's	Avera Health	SD	Active
Avera St. Mary's	Avera Health	SD	Active

TEMPLATES

Home > Templates
Templates

2. UND Department Agreement Template	Documents	Details
3. UND Sample Memo Templates	Documents	Details
Authorized User/Contact Access List	Documents	Details
Collaborative Clinical Agreement Process - User Guide	Documents	Details
UND Master Affiliation Agreement Template	Documents	Details

REPORTS & QUERIES

The screenshot shows the 'Reports & Queries' page. The left sidebar contains a 'Main Menu' with options: Agreements, Sites, Templates, Reports & Queries (selected), and Contact Information. The main content area is titled 'Reports' and lists the following report types:

- Agreements Report (All)
- Agreements Report (Department)
- Agreements Report (Master)
- Sites Report

CONTACT INFORMATION

The screenshot shows the 'Contact Information' page. The left sidebar is identical to the previous screenshot. The main content area displays a table with the following data:

FIRST NAME	LAST NAME	DEPARTMENT	DESIGNATION	E-MAIL ADDRESS	PHONE NUMBER
Nurul	Amin	NE Campus	IT	m.amin@und.med	7019852732
Cindy	Flom-Meland	Physical Therapy	Co-Chair	cindy.flom.meland@und.edu	701.777.4130
Jody	Paulson	Communication Sciences & Disorders	Co-Chair	jody.paulson@und.edu	701.777.3727
Hailee	Viekman	Occupational Therapy	Committee Member	hailee.awes@und.edu	701.777.2209
Mary Anna	Carls	Nutrition & Dietetics	Committee Member	mary.carls@und.edu	701.777.2539
Bev	Voigt	Physical Therapy	Committee Member	beverly.voigt@und.edu	701.777.4176