Clerx is the tracking system used by the Carver College of Medicine to confirm student completion of clerkship requirements.

https://webapps1.healthcare.uiowa.edu/Clerx

It is recommended that students add this site as a quick link/shortcut to the home screen of their smartphone and/or tablet for quick access to the system.

<table>
<thead>
<tr>
<th>iOS</th>
<th>Android</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open Safari (only works on Safari) and go to the Clerx site</td>
<td>Open Chrome and go to the Clerx site</td>
</tr>
<tr>
<td>Click on the ‘share’ button (recht)</td>
<td>Click on the menu button (†) and click ‘Add to homescreen’</td>
</tr>
<tr>
<td>Scroll to the right and click on ‘Add to Home Screen’</td>
<td>Rename the link to Clerx and click ‘Add’</td>
</tr>
<tr>
<td>Rename the link to Clerx and click ‘Add’</td>
<td>Clerx will now show up on the home screen as an app widget</td>
</tr>
<tr>
<td>Clerx will now show up on the home screen as an app cube</td>
<td></td>
</tr>
</tbody>
</table>

*technology is constantly changing therefore these instructions may vary depending on your phone or operating system

Students are required to have 100% completion of the following items tracked in Clerx to pass their clerkships:

- Required Clinical Experiences (RCEs)
- Direct Observation of Student Clinical Skills
  - History Taking
  - Physical/Mental Status Exam
- Mid-Clerkship Feedback

---

**Required Clinical Experiences (RCEs)**

- RCEs are a group of essential diagnoses, procedures, exams, and skills specific to each clerkship.
- Each RCE has a minimum specified level of participation (see below).
- Students must log RCEs weekly into Clerx
- Students can only log RCEs for their current clerkship and cannot log further back than 14 days
- Students must be able to provide an up-to-date RCE report for their mid-clerkship feedback meeting.
- All RCEs must be completed and logged by midnight Friday, the last day of the clerkship at the very latest. If a student has any issues logging RCEs by the deadline, they must talk to their clerkship director/coordinator before the deadline. Clerkships may have earlier deadlines.
- Students must complete and log all RCEs by the specified deadline to receive a passing grade for the clerkship.
Level of participation:

- **Observed**
  - The student was present in person and watched another care provider interact with a patient with a given condition or the student was present and watched another person perform a required procedure or skill.

- **Assisted**
  - A student actively participated to some degree in the care of a patient however another individual was the primary care provider for the encounter or the student participated and performed some portion of the skill/procedure but was not the primary provider of the skill/procedure.

- **Performed**
  - The student, with appropriate supervision, directly carried out the skill or procedure, or, with appropriate supervision, was the primary person to interact with a patient during a clinical encounter.

*Performed* is the highest level of participation and *observed* is the lowest. Therefore if the required level of participation is *observed*, selecting *observed*, *assisted* or *performed* will satisfy the requirement. Only *performed* will satisfy the requirement if the required level of participation is *performed*.

**How to enter an RCE:**

When a student logs into the system, it will automatically default to the clerkship/site in which they are currently enrolled. Below is one example.
There are two types of RCEs, one without modalities and one with modalities. Modalities mean that there is more information to enter to fulfill a requirement (RCEs marked with a downward arrow).

**Without** any modalities:

![Diabetes Mellitus](image)

**With** modalities:

RCEs with modalities have an arrow, which when clicked, opens a menu of items to select.

![Substance Misuse Counseling](image)

When looking at the RCE, an icon indicates a level of participation required and instructional text indicates how many times the RCE or modalities must be logged:

Students will need to see a minimum of one patient with hyperlipidemia where they were the primary person (with appropriate supervision) to interact with that patient.

Students will need to see a minimum of one patient (with any of the listed conditions) where they actively participated to some degree in motivational interviewing but they may have not been the primary provider.
To log an RCE, the student will need to click on the RCE and if it is one with modalities, click the modality that fits the clinical experience.

The following window will pop up:

1. The system automatically defaults the current date but students can click on the interaction date box and a calendar will pop up. Students can go back in time and select a date up until the first day of the clerkship or up to 14 days previous on the current clerkship. Students may not log into the future or for previous clerkships.

2. There is a text box for notes. Anything students put in this box will show up under the ‘Case Log’ tab. *Per the HIPAA Privacy Rule, do not log any specific identifying patient information such as names or MRNs into Clerx at this time.*

3. Also on this screen is where students will select their level of participation.

4. If students need a reminder of what minimum level of participation is required, they can find the symbol next to the RCE/modality (in this case it is performed).
5. Multiple RCEs/modalities can be added under one patient fulfilled multiple RCEs/modalities by selecting them in the ‘Add a modality’ drop down box.

6. After selecting a level of participation, the RCE/Modality will show up in the left side of the box.

7. Once completed; click ‘save’.

When the student returns to the main screen, the RCE (as long as the minimum number was entered at the correct/minimum level of participation) will show up as completed as it will turn green with a large green checkmark.

This is a completed RCE with modalities. It is shown both expanded and collapsed.
To view any completed cases, click on the ‘Case Logs’ tab:

Students will be able to see any entries they have made, including the notes that they entered.

On the top of the RCE screen is a progress circle and text that tracks how many RCEs have been completed and how many are left to complete.
Direct Observations of Clinical Skills
Students will also be responsible for recording and handing in the history and physical exam direct observation forms to prove that they were directly observed taking a history or performing a physical/mental status exam. Except for the Psychiatry Clerkship, there are two separate forms and students must have a faculty, fellow or resident observe them doing one of each on every clerkship:
- History Taking
- Physical Exam

Psychiatry has one form that combines the History and Mental Status exam. Both sections have to be complete, and they can be done on one or two separate occasions.

The student will need go into Clerx and mark down the date they were observed and upload the form(s). The clerkship coordinator will then verify that they received and viewed the completed observation.

In Clerx, the student will need to click on the ‘Observations’ tab.

Once in the Observations tab, there are two things that need to happen for each observation. The first is to select the date the observation took place and the second is to upload the observation form. Students will need to do both steps for each observation. One is for the patient history observation and one is for the patient physical/mental status exam.
When the date boxes are clicked on, a calendar pops up. Select the date which the observation took place. This must be the same date that is listed on the direct observation form.

The system automatically highlights to the current date but students can go back in time and select a date up until the first day of the clerkship or up to 14 days previous on the current clerkship. Students may not log into the future or for previous clerkships.

After selecting a date, the student will need to upload the correct form(s). To do this, either click on the box and upload by selecting a file or drag and drop. A tile of the file will appear if the upload was successful. An ‘X’ will appear if it is not successful. Permitted files: .pdf, .doc, .docx, .jpeg, .jpg, .png

PDF is the preferred file type. Up to two files can be uploaded per upload box. No matter how the form(s) are uploaded, the student will need to make sure that the form(s) are legible/clear and that the whole form from top to bottom is visible.

There are many free apps available for Android, iOS, and Windows phones for scanning (Adobe Scan is preferred as it is a free doc scanner app that automatically recognizes text/documents and clarifies content. There are also other apps such as CamScanner and Genius Scan.)
Once a date is selected and a file uploaded, the system will automatically save the date and file and a checkmark will appear at the top of the screen showing that the observation has been entered but that its pending verification until the clerkship coordinator verifies.

Once the coordinator verifies, the checkmarks at the top will turn green and the date, time, and person who verified will be confirmed under the date box.
Mid-Clerkship Feedback

Students will also be responsible for completing a self-assessment form prior to their mid-clerkship feedback/meeting.

Students will need to go into Clerx and mark down the date they met for mid-clerkship feedback and who they met with. The clerkship coordinator will then verify that they received the completed mid-clerkship feedback form (whether the student physically handed it in or uploaded it to ICON—how it is turned in is currently at the discretion of the clerkship).

In Clerx, the student will need to click on the ‘Feedback’ tab.

Once in the Feedback tab, there is a date box to enter the date the mid-clerkship feedback/meeting took place, a drop-down box to select the faculty member that the student met with, and an upload box to upload both pages of the mid-clerkship feedback form.
When the date box is clicked on, a calendar pops up. Select the date when the mid-clerkship feedback/meeting took place.

The system automatically highlights to the current date but students can go back in time and select a date up until the first day of the clerkship or up to 14 days previous on the current clerkship. Students may not log into the future or for previous clerkships.

When the ‘Feedback was provided by’ box is clicked on, students will see a drop down box with a list of faculty members that provide mid-clerkship feedback for that specific clerkship. Students may scroll through the list to find the correct name or type in the name to narrow down the list. If the faculty member is not on the list, contact your clerkship coordinator. Only faculty members may fill out the mid-clerkship feedback form.

**Clinical Pediatrics  PEDS:8301 [reset]**
Iowa City
Monday, December 31, 2018 through Friday, January 11, 2019

| RCEs ✓ | Observations ✓ | Feedback ✓ | Case Logs |

I was provided mid-clerkship feedback.

**Date of feedback**
1/9/2019

**Feedback was provided by**
After selecting a date, the student will need to upload the correct form(s). To do this, either click on the box and upload by selecting a file or drag and drop. A tile of the file will appear if the upload was successful. An ‘X’ will appear if it is not successful. Permitted files: .pdf, .doc, .docx, .jpeg, .jpg, .png. PDF is the preferred file type. Up to two files can be uploaded per upload box. No matter how the form(s) are uploaded, the student will need to make sure that the form(s) are legible/clear and that the whole form from top to bottom is visible.

There are many free apps available for Android, iOS, and Windows phones for scanning (Adobe Scan is preferred as it is a free doc scanner app that automatically recognizes text/documents and clarifies content. There are also other apps such as CamScanner and Genius Scan.)

Once a date is selected, a faculty member is selected, and form(s) uploaded, the system will automatically save the information and a checkmark will appear at the top of the screen showing that the feedback has been entered but that its pending verification until the clerkship coordinator verifies.

Once the coordinator verifies, the checkmark at the top will turn green and the date, time, and person who verified will be confirmed under the date box.
Collegiate Required Clinical Experiences (RCEs)

The following Required Clinical Experiences are experiences that cannot be tied to an individual clerkship or rotation. Because of this, collegiate RCEs have been created. At this time there are two collegiate RCEs. Both must be completed by April 30th of your M4 year. Since many students have a light clinical schedule their last semester, it is suggested to complete these RCEs by December of your M4 year.

Exam: Male Prostate
- Perform (1 time)
- Can be completed on any core, selective, advanced rotation

Phase III: Overnight Call (24-hour shift, no night float)
- Perform (3 times)
- Only can be completed during Phase III advanced rotations
- ICU, Advanced Inpatient Sub-Internship, some electives
- Overnight shifts during Emergency Medicine rotations DO NOT qualify

If you have any questions about the Clerx system or encounter an error, please contact:
Dana Hartman
Clinical Curriculum Associate
1150A MERF (Flocks Learning Community)
319-335-6824
dana-hartman@uiowa.edu

Updated 1/11/21 by Dana Hartman