



# OMB Chaperone Rule: Policy to Implementation

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# Oregon Medical Board Medical Chaperone Rule 847-010-0130

- Effective July 1, 2023
- Any Oregon Medical Board licensee must offer to make a trained chaperone physically present for any sensitive medical examination.





## OHSU Chaperone Policy

Doc. #: HC-PRM-147-POL Rev. 060923	Category: (Optional)	
Origination Date: 06/09/23	Effective Date: 07/01/2023	Next Review Date: 07/01/2026
Reviser (Title): Director, Patient Relations	Owner (Title): Director, Patient Relations	

**PURPOSE:** The purpose of this policy is to provide culturally sensitive and trauma informed care to patients during sensitive examinations, and any time a patient or provider requests a chaperone be present. The OHSU Patient Rights and Responsibilities state a patient has a right to request a chaperone during a healthcare encounter. More specifically, we universally offer a chaperone for all sensitive examinations for both adult and pediatric patients. The presence of a chaperone during the sensitive examination can provide reassurance to the patient about the professional context and content of the sensitive examination and the intent of the clinician. The chaperone also provides support for the clinicians serving as a witness to the events taking place should there be any misunderstanding or concern for misconduct.

**PERSONS AFFECTED:** All OHSU Healthcare Privileged and Independent Privileged Staff.

**POLICY:** Chaperones will be universally encouraged for patients for all sensitive examinations performed by Privileged and Independent Privileged Staff, regardless of location of care – ambulatory, emergency department, virtual visits, diagnostic imaging locations, and inpatient hospitalizations. Patients also have the right, and healthcare providers the option, to request a chaperone be present for any healthcare encounter.

# Chaperones are Required to be offered

- For all patients undergoing a sensitive examination
- By all Privileged and Independent Privileged Staff (extends beyond just those governed by the OMB)
  - Privileged Staff: Medical Staff credentialed with clinical privileges through Medical Affairs (e.g., those with PA, CRNA licenses)
  - Independent Privileged Staff: Medical Staff credentialed and privileged for independent practice through Medical Affairs (e.g., those with MD/DO, DPM, LAc, CNM, NP licenses)

*Patients have the right, and healthcare providers the option, to request a chaperone be present for any healthcare encounter.*

# The Presence of a Chaperone During a Sensitive Examination

- Provides reassurance to the patient
- Provides support for the clinicians should there be any misunderstanding or concern for misconduct.



# What is a sensitive examination?

- Any examination or procedure that may include exposure of any: breast, genital and/or rectal areas, regardless of age or gender.
- Includes physical contact examinations, telehealth visits, and visual distance examinations.



# Who can serve as a chaperone?

- An OHSU healthcare workforce member who holds an active Oregon license to practice a health care profession \*or\* who has completed this training approved by the Oregon Medical Board.
- Residents/Fellows
- Students

# Chaperone Training

- Minimum required: Review OMB-approved training material (eventually in Compass)
- Optional consideration: Train-the-trainer model, implementing nuanced workflows in individual units/clinics

# What if the patient declines a chaperone?

- If the person has decision-making ability, they can decline a chaperone.
- However, the Medical Staff member conducting the exam can also choose not to proceed with the sensitive examination if the patient declines a chaperone.

# If the patient declines a chaperone, the medical staff may:

- Defer the sensitive examination
- This could include rescheduling an ambulatory patient
- Perform the sensitive examination and document the patient or representative's consent to proceed without the presence of a chaperone.

# What if the patient is not able to consent for themselves? What if the examination is emergent?

- Unless a parent, guardian or legal representative of the patient declines the exam for them, a chaperone must be present to complete a sensitive examination.
- A chaperone is not required in the case of a life-threatening emergency where postponing an examination to wait for a chaperone could threaten the life or safety of the patient.

# Documentation Burden

- Documentation in the health record is the responsibility of the medical staff member (not the chaperone).
- Use the SmartPhrase, “.chaperone” in the patient’s electronic health record:
  - *The patient/guardian was offered a medical chaperone during the sensitive examination during this encounter. Patient/guardian has {List Below}*
    - *Agreed to have a chaperone present during the sensitive examination. The chaperone is\*\*\*.*
    - *Declined to have a chaperone present.*
- Documents presence/absence of chaperone
- Documents name of chaperone present
- Uses embedded SmartLists for future potential to query.

# Implementation

- Ambulatory
- Inpatient
- ED
- Diagnostic Imaging

# OMB Website

- <https://www.oregon.gov/omb/topics-of-interest/pages/chaperone.aspx>
- FAQ's updated 6/9/23 <https://www.oregon.gov/omb/Topics-of-Interest/Documents/FAQ%20Medical%20Chaperones.pdf>

The screenshot shows the Oregon OMB website. The top navigation bar includes the Oregon.gov logo and links for Home, Licensing, Forms, The Board, Statutes & Rules, Contact Us, and FAQs. A left sidebar contains a list of menu items: COLLABORATIVE PRACTICE, HEALTH CARE INTERPRETER REQUIREMENTS, HEALTH PROFESSIONALS' SERVICES PROGRAM, INTERNATIONAL MEDICAL GRADUATES, INTERSTATE MEDICAL LICENSURE COMPACT AND OREGON, LIABILITY LIMITATION FOR VOLUNTEER SERVICES, MEDICAL CERTIFICATION OF DEATH, OFFERING A MEDICAL CHAPERONE, MEDICAL MARIJUANA, and MONKEYPOX. The main content area is titled "Medical Chaperone Training & Training Courses" and contains the following text: "OMB licensees should ensure that chaperones understand their responsibilities to protect patients' privacy and the confidentiality of health information." followed by a bulleted list of requirements for chaperone training. Below this is a red-bordered box containing a "List of Reviewed Training Courses (open to public):" with three entries: PBI Education, Rouge Community College, and Oregon Health and Science University. The page concludes with a paragraph about requesting review of training courses and an email address: elizabeth.ross@omb.oregon.gov.

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HEALTH PROFESSIONALS' SERVICES PROGRAM

INTERNATIONAL MEDICAL GRADUATES

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LIABILITY LIMITATION FOR VOLUNTEER SERVICES

MEDICAL CERTIFICATION OF DEATH

OFFERING A MEDICAL CHAPERONE

MEDICAL MARIJUANA

MONKEYPOX

### Medical Chaperone Training & Training Courses

OMB licensees should ensure that chaperones understand their responsibilities to protect patients' privacy and the confidentiality of health information.

- No additional training is required if the chaperone holds an active Oregon license to practice a health care profession (physician, physician assistant, registered nurse, etc.).
- If the chaperone does not hold a health care professional license (medical assistant), the chaperone must complete a course for medical chaperones reviewed by the Oregon Medical Board.

Courses should include the training elements of appropriate observational techniques, documentation of encounters, maintaining boundaries in the workplace, draping techniques, the importance of neutrality, reporting requirements, and other components of a chaperone training program.

**List of Reviewed Training Courses (open to public):**

- [PBI Education](#), Medical Chaperone Training Program
- [Rouge Community College](#), Medical Chaperone Training
- [Oregon Health and Science University](#), Chaperone Education Course Slides (individuals maintain record of completion)

Many health care systems and group practices are developing their own medical chaperone training courses. To request review, entities may send a [request form](#) and course outline or slides to the OMB. The information can be emailed to [elizabeth.ross@omb.oregon.gov](mailto:elizabeth.ross@omb.oregon.gov). OMB staff aims to review and respond to requests within 10 business days of receipt.



Thank You!

Questions?

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