

CPE Policies and Procedures

Admissions Policy

Name of Policy and/or Procedure: Admissions

Purpose of Policy and/or Procedure: To provide an orderly and fair process for application and admission to HSL CPE programs, in accordance with ACPE Standards. It is the vision of the HSL CPE programs that their admissions process will create in its student group's diverse and well-prepared communities of learning, able to build on the unique identity and resources of the programs, and be of mutual benefit of the students and of Hebrew SeniorLife.

Policy: It is the policy of the HSL CPE programs to set and publish application deadlines for each unit of CPE, and to process the applications of the persons meeting those deadlines prior to considering any applications that arrive after the deadline.

It is the policy of the HSL CPE programs to assess each applicant's appropriateness for CPE in these settings without discrimination regarding race, gender, age, religion, national origin, sexual orientation, gender identity, gender expression, or disability, provided the applicant is capable of performing the duties as contained in the position description for the Chaplain Intern.

In terms of disability, it is stipulated that the reasonable accommodation of a candidate's disability is HSL's policy unless such condition can be shown to be a clear and present danger to the candidate, employees, residents, or patients, and reasonable accommodations cannot be made or would place an undue financial hardship on HSL. This policy notwithstanding, all students accepted into the HSL CPE programs shall be able, with reasonable accommodation, to physically perform the duties as contained in the position description for Chaplain Intern. In addition to physical requirements, CPE students must sustain sufficient emotional health to deliver spiritual care. Each student must demonstrate the capacity to establish and maintain relationships consistently and be open to learning, change, and growth. Each CPE student must demonstrate a capacity to endure at least moderate amounts of the stress that are a normal part of institutional life and culture in a large long-term chronic care hospital.

Each applicant must meet the criteria for the level of CPE for which they are applying in order to be accepted into the program. The CPE educator(s) and CEC will assess which level a student will work at if they have completed previous CPE unit(s) prior to the use of the new Outcomes and Indicators (2023-24). Each new applicant submits:

For Level IA:

A completed ACPE application, turned in with the \$36 application fee.

An in-person or Zoom admissions interview with the CPE Educator(s) and/or Certified Educator Candidate of the program being applied for, with the possibility of adding another member of the Professional Advisory Committee or spiritual care department.

Graduation from high school, completion of a GED, ordination by a religious/spiritual/values-based orienting system community, or commission by such community to function in spiritual caregiving. Graduation from college and some graduate level study strongly preferred.

Communication, writing, and analytical skills adequate to sustain success in the CPE learning model. Some introductory experience in spiritual care as a rabbi, rabbinical student, cantor, pastor, seminarian, member of a religious order, or active layperson in a religious/spiritual/values-based orienting system community, or in another professional caregiving discipline such as nursing, social work, psychology, or medicine.

Interest in practicing spiritual care in the context of HSL.

Openness to process learning, about self and others.

The capacity for meaning-making reflection in relation to their religious/spiritual/values-based orienting system.

Health adequate to sustain education and spiritual care for the required number of hours per week in the assigned setting, completion of all assignments, and the fulfillment of all items in the Chaplain Intern Position Description included in the Student Handbook.

Facility with the English language adequate to sustain success in the CPE program.

For Level IB:

All of the above, plus:

One previous unit of CPE, and if completed under the new Outcomes and Indicators, documentation from the previous educator's evaluation that the applicant is ready to move to Level IB.

Copies of the applicant's self-evaluation and their educator's evaluation from their first unit of CPE.

For Level IIA:

Two previous unit of CPE, and if completed under the new Outcomes and Indicators, documentation from the previous educator's evaluation that the applicant is ready to move to Level IIA.

Copies of the applicant's self-evaluation and their educator's evaluation from their first two units of CPE.

For Level IIB:

Three previous unit of CPE, and if completed under the new Outcomes and Indicators, documentation from the previous educator's evaluation that the applicant is ready to move to Level IIB.

Copies of the applicant's self-evaluations and their educator(s)' evaluations from their first three units of CPE.

Procedure:

Prospective students may inquire about a CPE program at HSL by e-mail, by phone, or in person. The Educator(s) or CEC provides written material about the unit (including its application deadline), directions on accessing the standard ACPE application form, and the opportunity to ask any questions.

First unit at HSL: If this would be the first unit for the student in an HSL CPE program, the applicant completes and submits their full application and pays the application fee. The CPE Educator(s) and/or CEC makes a determination of whether to take the student's application to the next step, which involves an interview. If the Educator(s) and/or CEC decides not to interview the candidate, a letter is sent to the candidate denying admission to the program.

If the Educator(s) and/or CEC chooses to process the application further, they set up an onsite or Zoom interview for the applicant with the Educator(s) and/or CEC and/or a member of the spiritual care department or Professional Advisory Committee. The Administrative Assistant of the CPE programs sends a reference form to the applicants' references, asking each to evaluate the applicant's readiness for CPE at HSL. In the rare case where the given reference person is not reachable by email, a phone conversation covering the questions on the reference form may be held.

In the interview, the CPE Educator(s) and/or CEC and/or other interviewers seek to determine the applicant's readiness and ability for clinical learning in the HSL context and whether HSL is a setting conducive to the applicant's learning goals.

Subsequent unit at HSL: In the situation in which a student wishes to pursue a subsequent CPE unit at HSL, the student writes and sends to the Educator(s) and/or CEC a request to be considered for the desired unit by the deadline for admissions for the unit desired. The applicant will include a new ACPE face sheet with the request, as well as a brief description of potential learning goals should they return to HSL.

If some time has elapsed since the applicant's previous CPE experience at HSL, or if the applicant worked with a different Educator or CEC in an HSL CPE program, the Educator(s) and/or CEC may require the student to submit a full application again, in which case the application fee must be paid, and an interview will be scheduled.

Communication of Admissions Decisions: Within an agreed upon time no longer than eight weeks from the admissions deadline, and within one month of the actual interview, the CPE programs send the applicant email notice of the admissions decision. If the student is offered provisional admission, the letter indicates the level of CPE to which the student is being provisionally admitted and contains information on the date by which the student must accept the offer and send a \$600 non-refundable deposit and a signed [Use of Materials Consent Form](#) in order to hold their place.

If the CPE programs decline to offer the applicant admission, the response letter reflects that decision, and the application materials are shredded.

Once the student cohorts are chosen and the students have committed to doing an HSL CPE unit, the programs' educators and/or CEC assigns each student to a particular HSL CPE program and informs them of the decision.

Final Admission: Admission to an HSL CPE program is provisional until the student has completed the onboarding process entirely and been cleared by HSL to participate in the program. The onboarding process includes payment of full tuition, health and CORI screening, as well as documentation of having health insurance accessible in Massachusetts for the period of the CPE program. When the student has been cleared, the educator or CEC informs them by email that their admission is final. Failure to complete the onboarding process by the deadline may result in the student losing their place in the program. If information should emerge after an admissions decision that would make the student's participation in CPE inadvisable, the educator or CEC may rescind the offer of admission.

Date last reviewed: 5/25 Hb 24 pp Admission

Annual Notice Regarding Student Records

ACPE Required Policy

This document is posted on the HSL CPE website, referred to on the information sheet about each unit of CPE, included in both the Roslindale and NewBridge Student Handbooks, and is reviewed during Orientation.

The *Family Education Rights and Privacy Act (FERPA)* applies to all ACPE CPE programs. *FERPA* addresses *privacy* not *confidentiality* issues. This means students own the information about them and must know what is being collected and how it is being used. Their information may not be shared without their written permission.

A student record is: any record (paper, electronic, video, audio, biometric etc.) (1) directly related to the student from which the student's identity can be recognized; and (2) maintained by the education program/institution or a person acting for the institution. Note: Application materials of students admitted and matriculated are part of the student record.

Directory Information is student information not generally considered harmful or an invasion of privacy if released. At HSL this information includes name, address, email, and telephone numbers. It may include student submitted photographs and introductory biography paragraphs. A student may opt out of having this information released by signing, dating, and returning to the CPE Educator documentation of such.

Before an HSL CPE program releases information, students must have received the *Annual Notice*.

Current students can restrict directory information and/or record access at any time during attendance. Restrictions must be honored even after the student's departure. Former students may not initiate new restrictions after departure.

Student Record: ACPE requires that the CPE student record include the application face sheet with directory information and the CPE Educator's or CEC's final evaluation report. At HSL, the student record also includes the student's final self-evaluation report.

A copy of the CPE Educator's or CEC's final evaluation report will be sent to the student. The student will be informed that the CPE program will keep this evaluation for a minimum of ten years, and will release a copy of this document only with written permission from the student. Similarly, the student will be informed that the CPE program will keep the student's final self-evaluation for a minimum of ten years, and will release a copy of this document only with written permission from the student. (Note "Exceptions" below.)

Students are responsible for maintaining their own files for future use. The CPE program will not keep a permanent file of evaluation reports. Students will be informed at the time copies are sent to them that it is their responsibility to keep copies for future use.

CPE students are responsible for sending their evaluations to their seminary, graduate school, denomination, or other entity if required for credit.

After ten years, the final evaluations may be removed from the record, and the Student Record will consist of the application face sheet only. For electronic applications, if the student submitted the face sheet and essays in one pdf document, this full document will be kept in the secured Student Record.

Supervisory Notes: The CPE Educator or Certified Educator Candidate may keep process notes on a student. These process notes are for the exclusive use of the writer and are not considered a part of the student's record. They are kept separately from the student record.

Exceptions: Certain exceptions concerning the release of information exist to protect the health or safety of the student or others, and for the purpose of accreditation or complaint review, or as required for legal processes. Before releasing material in any of these circumstances, the CPE Educator will consult with the ACPE Executive Director.

In accordance with FERPA, a student is able to review their record within 45 days or less of their request, and may make one Xerox copy of the record at HSL. Requests must be made in writing, not by phone, fax, email, or conversation. Record inspection will not be denied based on the student's inability to come to the site or on outstanding financial obligations. In such cases, the CPE program will note on the copy sent, "not available for official use." When a student record contains identifiers of another student, those will be redacted.

A student has the right to object to record content. If not negotiable, the written objection will be kept with and released with the record. Grades are exempted from this right.

At HSL, support staff for the CPE programs may have access to student records for the purposes of administration only, and subgroups of the Professional Advisory Committee focusing on curriculum and program improvement may have access to student records acting in their roles as educational officials with a legitimate education interest. Identifying information will be redacted when documents are shared with subgroups on the Professional Advisory Committee, with every attempt made to prevent identification of the student.

Records Management: Students' health records are kept in locked files separate from other student records and are maintained securely by the Academic Programs department of Hebrew SeniorLife. These are deleted within a year after the end of the student's CPE unit. Signed Agreements for Training, Receipts of Policies and Procedures, and Enrollment and Exit Data forms may be maintained until the next scheduled 6 year accreditation site review. All other documents held by the CPE office during a student's CPE program related to institutional onboarding and CPE program orientation are disposed of/deleted after the conclusion of the student's program at HSL. Signed permissions for an educator or Certified Educator Candidate to film their work with a student or students are kept indefinitely.

Beyond what is kept in the Student Record, or in Supervisory Notes, or released with permission by the student to the educator or CEC for educational purposes, all other written or digital work relating to a student is disposed of/deleted after the completion of the unit about which the material is related.

Should the CPE program be temporarily without an ACPE Certified Educator, the Director of CPE or the Administrator to whom the ACPE Certified Educator reported is responsible for securing CPE student records and is the only person authorized to retrieve student records in response to a former student's written request.

Should the CPE program close, the Director of CPE or certified educator or appointed designee will secure all student records and ship or securely transfer them digitally to the national ACPE office, c/o Accreditation.

Digital Records: HSL is moving from paper to digital record keeping, a process expected to be completed during 2025. Compliance with ACPE Standards and this policy apply to records stored in both media. HSL's IT system has a weekly back-up of all digital files.

Violations of these protocols may be reported to the Chair of the Accreditation Commission at: *ACPE, 1 Concourse Parkway, Suite 800, Atlanta GA 30328.*

Date last reviewed: 5/25 Hb 24 Annual Notice and Student Records

Attendance Policy

Name of Policy and/or Procedure: Attendance

ACPE Standard(s) Addressed: Accreditation Standard 2

Purpose of Policy and/or Procedure: To clarify attendance requirements for successful completion of a CPE unit, in recognition of the positive impact on all students of full participation in all program components, and of the negative impact of any student's absenteeism on both individual and group learning.

Policy: It is the policy of the HSL CPE program to require attendance at all components of the CPE unit, within the following parameters:

Hours Required: Minimum hourly requirements for CPE must be maintained by the student to receive credit for a unit of CPE. All participation in the CPE program is based on the intention to complete a full unit: at least 100 hours of education and 250 of clinical work, and a total of 400 hours. If excused absences – within the limits set by this policy – interfere with these requirements, the student must negotiate compensatory hours (in the corresponding educational and/or clinical category) with the Educator/Certified Educator Candidate. Compensatory time in an extended or condensed program must be made up within a month of the absence necessitating it and in all cases should be completed prior to the end date of the unit. Compensatory time in an intensive program must be made up within 2 weeks of the absence necessitating it and in all cases should be completed prior to the end date of the unit. If absences exceed the limits set by this policy, regardless of compensatory time worked, no credit for the program is given.

Total Days Absent: *There are no vacation days for students during a CPE unit.* This policy addresses unavoidable absences. In an extended or condensed unit, no more than 3 classroom days total may be missed for any reason and still receive credit for the unit. Concurrent classroom absences of more than 2 days for any reason will result in no credit being given for the unit. In this case, the CPE Educator/CEC may dismiss the student from the unit, or allow the student to stay in the unit with no credit being given, at the Educator's or CEC's discretion. Days missed mean compensatory days worked.

In an intensive unit, no more than *4 days total* may be missed for any reason and still receive credit for the unit. Concurrent classroom absences of more than 3 days will result in no credit being given for the unit. In this case, the CPE Educator/CEC may dismiss the student, or allow the student to stay in the unit with no credit being given, at the Educator's/CEC's discretion. Days missed mean compensatory days worked.

Allowed absences, totaling no more than what is delineated above, must be approved by the CPE Educator/CEC and may include the following:

- Illness
- Family Crisis (death, severe illness, etc.)

- Previously approved planned event (denominational conference meetings at which your attendance is required, ordination exams, immediate family member's wedding, or other similarly major and unavoidable conflicts)

No permission for planned absences will be granted for the days of CPE orientation, Midunit or final evaluations, or the siyyum (graduation). The CPE Educator/CEC may grant or withhold permission for a requested absence.

Notification of Absence: It is the student's responsibility to request and negotiate all absences with the CPE Educator/CEC prior to the absence. Students are responsible for informing their floor liaisons or preceptors of their absence and rescheduling their clinical time. The Educator/CEC should be cc'ed on these communications.

Unexcused Absence: The CPE Educator/CEC has the right to put a student with an unexcused absence on probation or to dismiss the student from the CPE program at any time.

Procedure:

For Sickness: A student needing to be absent due to illness calls/texts the Educator/CEC prior to 15 minutes before that student's hours begin, and either speaks to the Educator/CEC directly or leaves a voice-mail message or text. A text and email should also be sent if a voicemail message is left. The student should also contact their floor liaison or preceptor to notify them, in a manner determined jointly by the liaison or preceptor and the student. If the student is unclear about whether being at HSL/HRC or their external site that day is advisable, they should consult the Educator, the Work Restrictions for Health Care Personnel policy in this handbook, or consult with Employee Health directly (OccupationalHealth@hsl.harvard.edu or 781-234-9608) with its decision made binding. Students are asked to be conservative in their assessment of their own illness, due to the frailty of our patient population.

In the case of known direct exposure to a highly communicable or contagious disease (COVID, Hand, Foot and Mouth, Norovirus, etc.) where medical guidance makes it advisable to isolate or quarantine, all efforts will be made to include the student virtually for class days so that the student's content learning and CPE participation are not compromised.

For Family Crisis: A student needing to be absent due to sudden family crisis calls the Educator/CEC prior to the absence, and either speaks to the Educator/CEC directly or leaves a voice-mail message or text. A text and email should also be sent when a voicemail message is left. The student should also contact their floor/unit liaison or preceptor.

For Planned Absence: A student wishing to be absent from the CPE unit for a planned absence should discuss this with the Educator/CEC prior to the start of, or if that is not possible, as soon as possible after the start of, the CPE unit.

Total Days Absent: If a student exceeds the acceptable total number of days absent or concurrent number of days absent, the CPE Educator/CEC will inform the student in person, if possible, and in writing, of their decision whether to give the student the option of remaining engaged in the activities of the CPE program without getting credit, or to dismiss the student from the program. If the student remains active, no tuition refund is made. If the student is dismissed, the terms of the Financial Policy apply.

Hours Required: Students with excused absences within acceptable limits must negotiate with their Educator/CEC the scheduling of any compensatory hours needed to keep up with the time requirements for their CPE program.

Notification: Students must negotiate all absences with the CPE Educator/CEC ahead of time.

Unexcused Absence: When the Educator/CEC determines an absence to be unexcused, they inform the student of this decision in writing.

Process Notes: The student's weekly process notes include a tally of hours spent in CPE activities for the week and a cumulative tally for the unit of educational, clinical, and total hours completed to date.

Date last reviewed: 5/25

Hb 24 pp attendance

Financial Policy

Name of Policy and/or Procedure: Financial Policy

Purpose of Policy and/or Procedure: To provide clear direction for HSL's CPE programs' financial transactions and obligations with their students.

Policy:

Application Fee: It is the policy of the HSL CPE Programs to charge a \$36 nonrefundable application fee of all applicants.

Tuition in a Full Unit: It is the policy of the HSL CPE Programs to charge tuition of \$1250 for a single unit of CPE when the student's clinical work is done within the HSL system; tuition is \$1800 if the student uses employment outside HSL as the clinical component of the program. \$600 of tuition serves as a nonrefundable deposit when accepting a position in the program and is credited toward the total tuition payment.

Tuition Adjustment: For students who are not employees of HSL, in cases of hardship which are documented by the student's graduate school, religious leader, or social worker, the student may apply for a partial scholarship toward the amount of tuition for which they are personally responsible (not the part a graduate school, denomination, or congregation is paying). Students are expected to pay at least half the amount of tuition for which they are personally responsible. They may apply for tuition adjustment through contacting the program administrative assistant.

Tuition Payment Deadlines: The first half of the tuition (\$600) is a nonrefundable deposit sent to HSL within the deadline specified in the student's letter of CPE acceptance. Any remaining amount is due 30 days prior to the first day of the program, unless otherwise negotiated in writing with the Educator, but in all cases must be paid by the last day of the program. Failure to provide for the full or adjusted tuition by its due date means that the student forfeits their deposit, no CPE credit is given, and the student will not be admitted to another CPE program at HSL.

Refunds: It is the policy of the HSL CPE Programs to offer tuition refunds according to the following schedule:

- If the student leaves the unit due to disciplinary dismissal, no refund is given.
- If the student withdraws from the program before the start of the program the nonrefundable deposit and any additional tuition paid may be counted for tax purposes as a donation to the HSL CPE Fund, but will not be refunded.
- If the student leaves before completion of orientation, one half of the tuition excluding the deposit, will be returned (\$300 for a unit in which tuition is \$1200).

In this case, the remaining tuition may be counted for tax purposes as a donation to the HSL CPE Fund (\$300).

- If the student departs before the midunit evaluation, one quarter of the tuition, excluding the deposit will be returned (\$150 for a unit in which tuition is \$1200). In this case, the remainder of the tuition may be counted for tax purposes as a donation to the HSL CPE Fund (\$450 for a unit in which tuition is \$1200).
- If the student leaves after midunit, no refund is given.
- In cases of compelling personal hardship or catastrophe, the Director of CPE may make exceptions to this policy. Criteria for exceptions include a doctor's or therapist's documentation of the student's inability to continue participation in the unit of CPE due to a new medical or mental health condition; documentation of the student newly becoming the primary care provider for a family member; a significant change in family circumstances, such as a death in the family, which makes participation untenable; documentation from the student's employer that their original release from work to fulfill the class and clinical hours of CPE has been rescinded; or HSL no longer being able to offer the student a clinical assignment or to create an external Site Agreement through which the student can fulfill their clinical hours. "New" in this policy refers to the time since the student paid their non-refundable deposit.

Benefits: CPE students have free parking on or near the HRC Roslindale campus or in the staff lot at NBOC. NBOC currently offers a \$5 employee meal program for which students are eligible (non-kosher).

Occasionally, grants support a residency position with stipend and employee benefits for one student to engage a 9- or 12-month full-time CPE experience with the HSL CPE programs, during which time they typically complete 2-3 units of CPE and may have the opportunity to work at multiple sites within HSL. The compensation details of any such position are advertised clearly and then put into a written letter of offer to the successful candidate.

Otherwise, there is no stipend support for students doing CPE at HSL, and unless they are already HSL staff members, they are considered volunteers from the point of view of HSL. As volunteers they are not provided access to health insurance through HSL.

Procedure: This policy is posted on the HSL CPE website, and applicants are referred to it on the basic information sheet about each unit. Student acceptance letters include information on deposit and tuition requirements, as well as information on any incidental expenses they will incur to meet the requirements of the program.

Students should pay through the [link](#) on the HSL CPE programs' website to pay the application fee, deposit, and tuition. In cases where this is not possible, they may submit checks made out to the "HSL CPE Fund" and mailed to administrative

assistant for CPE for processing [HSL CPE Programs, 1200 Centre St., Roslindale, MA, 02131.

This financial policy is posted on the website, included in the student handbooks, and is reviewed during the orientation period of the programs. Students are given the opportunity to review and ask for clarification about this policy, and sign a receipt of having done so.

Date last reviewed: 5/25



USE OF CLINICAL MATERIALS CONSENT FORM

This form must be reviewed and signed by the CPE student prior to formal admission to an ACPE accredited CPE program and at the start of each subsequent unit in which the student enrolls.

CPE students shall be informed prior to acceptance into the program, as well as at the start of each subsequent unit, that their clinical materials and recorded and/or live observation media that are pertinent to the certification processes for Certified Educator Candidates or Associate ACPE Certified Educators, that are pertinent to the peer review process for ACPE Certified Educators, that are pertinent to a center's accreditation process, or that are pertinent to ACPE approved research studies, may be used from the unit. ***All identifying information shall be redacted from written documents. A copy of this signed agreement shall remain a part of the center's files indefinitely. Materials that are not supported with this signed Consent Form MAY NOT BE USED.***

I, _____ understand that _____
Students' Printed Name Certified Educator Candidate/ACPE Certified Educator

will use my written evaluation, the above-named educator's written evaluation of me, and other clinical materials pertinent to the above-named educator's process toward certification as an ACPE Certified Educator or as part of the above-named educator's peer review process, and I understand that such materials will have personal information redacted. I understand that the above-named educator will use recorded and/or live observation media that are pertinent to the above-named educator's process toward certification as an ACPE Certified Educator or as part of the above-named educator's peer review process, and I understand that such media may identify me. I understand that this use is for the purpose of the above-named educator's professional development, certification, and/or peer review. I understand that my written materials and live/recorded observation media that may identify me may be read, heard, viewed, and discussed by the above-named educator's professional colleagues as they assess the above-named educator's professional development and competence as an ACPE Certified Educator.

I understand that my clinical materials may be utilized by my center as data for demonstrating compliance with ACPE Standards for accreditation and/or for ACPE approved research studies without further notification to me.

My signature grants consent to all of the above.

I understand that I may revoke this authorization, in writing, to the above-named individual and that if I choose to do this, I will no longer be able to participate in the unit of CPE and will not

receive credit for the unit. Any clinical materials and/or live/recorded observation media obtained prior to the revocation of this authorization may still be used by the above-named educator.

Student's Signature

Date

Start and End Dates of the Unit