

# Clerx

## Medical Student Guide

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.

 iOS	 Android
<ul style="list-style-type: none"> <li>• Open Safari (only works on Safari) and go to the Clerx site</li> <li>• Click on the 'share' button </li> <li>• Scroll to the right and click on 'Add to Home Screen'</li> <li>• Rename the link to Clerx and click 'Add'</li> <li>• Clerx will now show up on the home screen as an app cube</li> </ul>	<ul style="list-style-type: none"> <li>• Open Chrome and go to the Clerx site</li> <li>• Click on the menu button (⋮) and click 'Add to homescreen'</li> <li>• Rename the link to Clerx and click 'Add'</li> <li>• Clerx will now show up on the home screen as an app widget</li> </ul>

*\*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 list of patient tasks, 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:

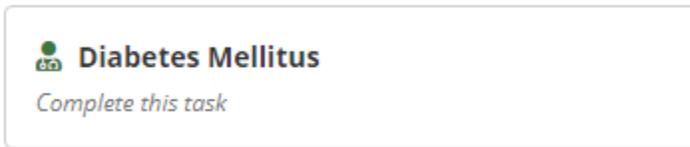
When a student logs into the system, it will automatically default to the clerkship/site in which they are currently enrolled. Below is one example.

The screenshot shows a web interface for 'Community Based Primary Care' with the following details:

- Header: 'Community Based Primary Care MED:8301 [reset]'
- Location: 'Waterloo'
- Date Range: 'Saturday, December 15, 2018 through Wednesday, January 9, 2019'
- Progress: '0%' (You have completed 0 of 15 RCEs)
- Navigation: 'RCEs', 'Observations', 'Feedback', 'Case Logs', and a 'New Case Log' button.
- Task Grid (15 tasks):
  - Complete Physical (any age) - Complete one of these tasks
  - Diabetes Mellitus - Complete this task
  - Exam: HEENT - Complete this task
  - Gastrointestinal Disorders - Complete one of these tasks
  - Goals of Care Counseling - Complete one of these tasks
  - Hyperlipidemia - Complete this task
  - Hypertension - Complete this task
  - Mental Health Counseling - Complete this task
  - Motivational Interviewing - Complete one of these tasks
  - Musculoskeletal Disorders - Complete one of these tasks
  - Pharmacotherapy Counseling - Complete one of these tasks
  - Residential Facility Patient Care - Complete this task
  - Respiratory Disorders - Complete one of these tasks
  - Substance Misuse Counseling - Complete one of these tasks
  - Thyroid Disorders - Complete one of these tasks

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).

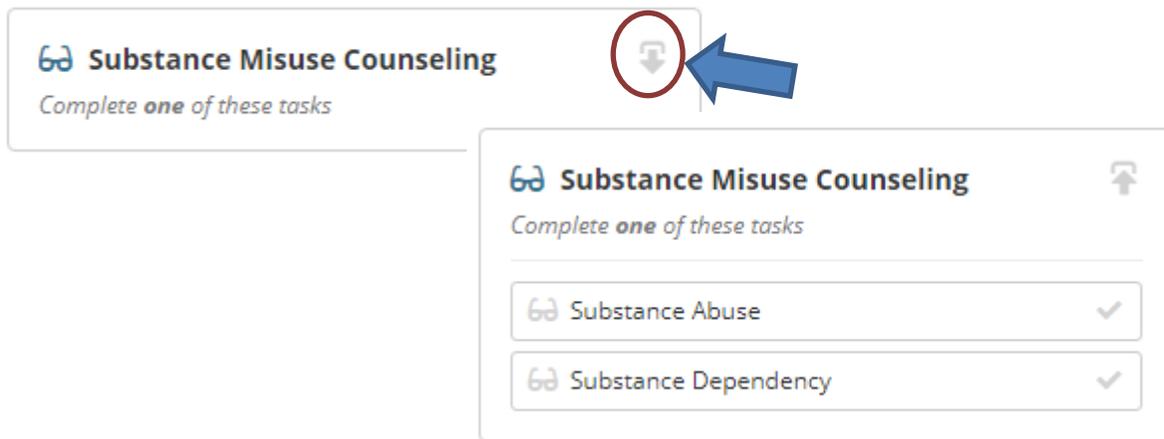
**Without** any modalities:



 **Diabetes Mellitus**  
Complete this task

**With** modalities:

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



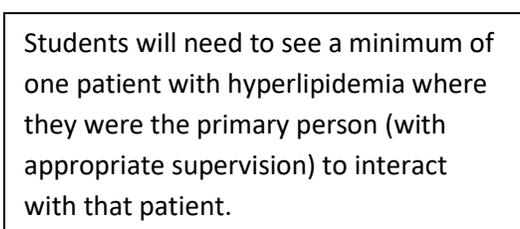
 **Substance Misuse Counseling**  
Complete **one** of these tasks

 **Substance Misuse Counseling** 

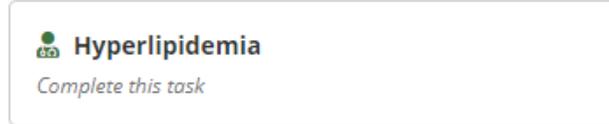
Complete **one** of these tasks

-  Substance Abuse 
-  Substance Dependency 

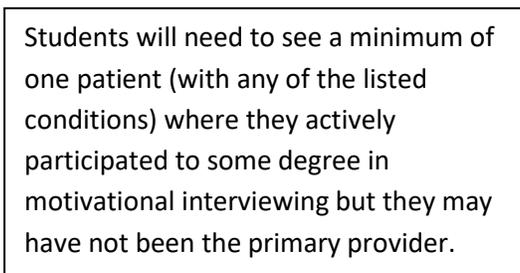
When looking at the RCE, an icon indicates a level of participation required and instructional text indicates how many times the RCE or modalities must be logged:



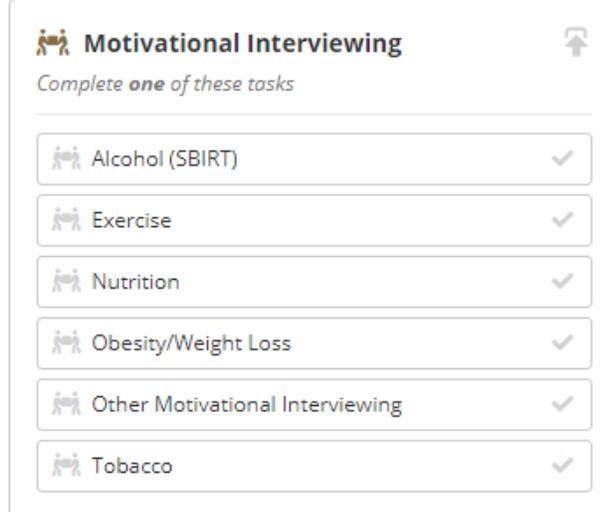
Students will need to see a minimum of one patient with hyperlipidemia where they were the primary person (with appropriate supervision) to interact with that patient.



 **Hyperlipidemia**  
Complete this task



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.



 **Motivational Interviewing** 

Complete **one** of these tasks

-  Alcohol (SBIRT) 
-  Exercise 
-  Nutrition 
-  Obesity/Weight Loss 
-  Other Motivational Interviewing 
-  Tobacco 

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:

The screenshot shows the 'Add Case Log' window. At the top left, there are tabs for 'Current Clerkship' and 'Clerkship History'. The main title is 'Add Case Log'. Below the title, there are three sections: 'Interaction date', 'Notes', and 'Modalities'. The 'Interaction date' section has a text box with '1/08/2019' and a blue arrow labeled '1' pointing to it. A calendar pop-up is visible above the text box, showing 'January 2019' with the 9th selected. The 'Notes' section has a text box with a blue arrow labeled '2' pointing to it. The 'Modalities' section has a text box with the text 'you haven't recorded any modalities yet'. To the right, there is a separate window titled 'Add a modality' with a search bar containing 'Inflammatory Bowel Disease' and a blue arrow labeled '4' pointing to it. Below the search bar are three buttons: 'observed this modality' (blue), 'assisted with this modality' (orange), and 'performed this modality' (green). A blue arrow labeled '3' points to the 'performed this modality' button. At the bottom right of the 'Add Case Log' window are 'Cancel' and 'Save' buttons. The background shows a navigation bar with 'Impersonate', 'User: dehartma', 'Logout', and 'Role(s)'. At the bottom of the screen, there are two 'Complete this task' buttons.

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).

## Add Case Log

X

The screenshot shows the 'Add Case Log' form. On the left, there are fields for 'Interaction date' (1/09/2019), 'Notes', and a list of 'Modalities' including Anemia (Other), Abnormal Weight Gain, and Weakness. On the right, there is a section titled 'Add a modality' with a dropdown menu and three buttons: 'I observed this modality', 'I assisted with this modality', and 'I performed this modality'. A blue arrow labeled '5' points to the dropdown menu. Another blue arrow labeled '6' points to the 'Modalities' list. A third blue arrow labeled '7' points to the 'Save' button at the bottom right. Below the form are 'Cancel' and 'Save' buttons.

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.

The first screenshot shows an expanded RCE for 'Gastrointestinal Disorders' with a large green checkmark and the text 'You have completed this RCE'. Below the title is a list of modalities: Constipation, Diarrhea, Dyspepsia, GERD, Inflammatory Bowel Disease (highlighted with a green border and a checkmark), and Irritable Bowel Syndrome. The second screenshot shows the same RCE collapsed into a single green box with the title and checkmark.

To view any completed cases, click on the 'Case Logs' tab:

Community Based Primary Care MED:8301 [reset]  
Sioux City  
Saturday, December 15, 2018 through Wednesday, January 9, 2019

RCEs Observations Feedback **Case Logs** New Case Log

**Complete Physical (any age)**  
Complete one of these tasks

**Diabetes Mellitus**  
Complete one of these tasks

**Exam: HEENT**  
Complete this task

**Gastrointestinal Disorders** ✓  
You have completed this RCE

**Goals of Care Counseling**  
Complete one of these tasks

**Hyperlipidemia**  
Complete this task

**Hypertension**  
Complete this task

**Mental Health Counseling**  
Complete this task

**Motivational Interviewing**  
Complete one of these tasks

**Musculoskeletal Disorders**  
Complete one of these tasks

**Pharmacotherapy Counseling**  
Complete one of these tasks

**Residential Facility Patient Care**  
Complete this task

**Respiratory Disorders**  
Complete one of these tasks

**Substance Misuse Counseling**  
Complete one of these tasks

**Thyroid Disorders**  
Complete one of these tasks

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

Community Based Primary Care MED:8301 [reset]  
Sioux City  
Saturday, December 15, 2018 through Wednesday, January 9, 2019

RCEs Observations Feedback **Case Logs** New Case Log

13%  
You have completed 2 of 15 RCEs

1/8/2019 **Inflammatory Bowel Disease**  
pt also has hypertension and counseled for weight mgmt

1/8/2019 **Diabetes Mellitus**  
discussed changes to insulin; ordered dietitian consult

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.

Community Based Primary Care MED:8301 [reset]  
Sioux City  
Saturday, December 15, 2018 through Wednesday, January 9, 2019

RCEs Observations Feedback **Case Logs** New Case Log

13%  
You have completed 2 of 15 RCEs

**Complete Physical (any age)**  
Complete one of these tasks

**Diabetes Mellitus** ✓  
You have completed this RCE

**Exam: HEENT**  
Complete this task

**Gastrointestinal Disorders** ✓  
You have completed this RCE

**Goals of Care Counseling**  
Complete one of these tasks

**Hyperlipidemia**  
Complete this task

**Hypertension**  
Complete this task

**Mental Health Counseling**  
Complete this task

**Motivational Interviewing**  
Complete one of these tasks

**Musculoskeletal Disorders**  
Complete one of these tasks

**Pharmacotherapy Counseling**  
Complete one of these tasks

**Residential Facility Patient Care**  
Complete this task

**Respiratory Disorders**  
Complete one of these tasks

**Substance Misuse Counseling**  
Complete one of these tasks

**Thyroid Disorders**  
Complete one of these tasks

## 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.

Community Based Primary Care MED:8301 [reset]  
Sioux City  
Saturday, December 15, 2018 through Wednesday, January 9, 2019  
You have completed 2 of 15 RCEs

RCEs ✓ Observations ✓ Feedback ✓ Case Logs [New Case Log](#)

<b>Complete Physical (any age)</b> Complete one of these tasks	<b>Diabetes Mellitus</b> You have completed this RCE ✓	<b>Exam: HEENT</b> Complete this task
<b>Gastrointestinal Disorders</b> You have completed this RCE ✓	<b>Goals of Care Counseling</b> Complete one of these tasks	<b>Hyperlipidemia</b> Complete this task
<b>Hypertension</b> Complete this task	<b>Mental Health Counseling</b> Complete this task	<b>Motivational Interviewing</b> Complete one of these tasks
<b>Musculoskeletal Disorders</b> Complete one of these tasks	<b>Pharmacotherapy Counseling</b> Complete one of these tasks	<b>Residential Facility Patient Care</b> Complete this task
<b>Respiratory Disorders</b> Complete one of these tasks	<b>Substance Misuse Counseling</b> Complete one of these tasks	<b>Thyroid Disorders</b> Complete one of these tasks

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.

Clinical Orthopaedics ORTH:8301 [reset]  
Monday, March 25, 2019 through Friday, April 5, 2019  
You have completed 0 of 2 requirements

RCEs ✓ Observations ✓ Feedback ✓ Case Logs

I was observed taking the relevant portions of the patient history.

**Date observed**  **Date observation took place**

Drop files or click here to upload

Upload observation form(s)

I was observed performing the relevant portions of the patient physical or mental status exam.

**Date observed**

Drop files or click here to upload

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.**

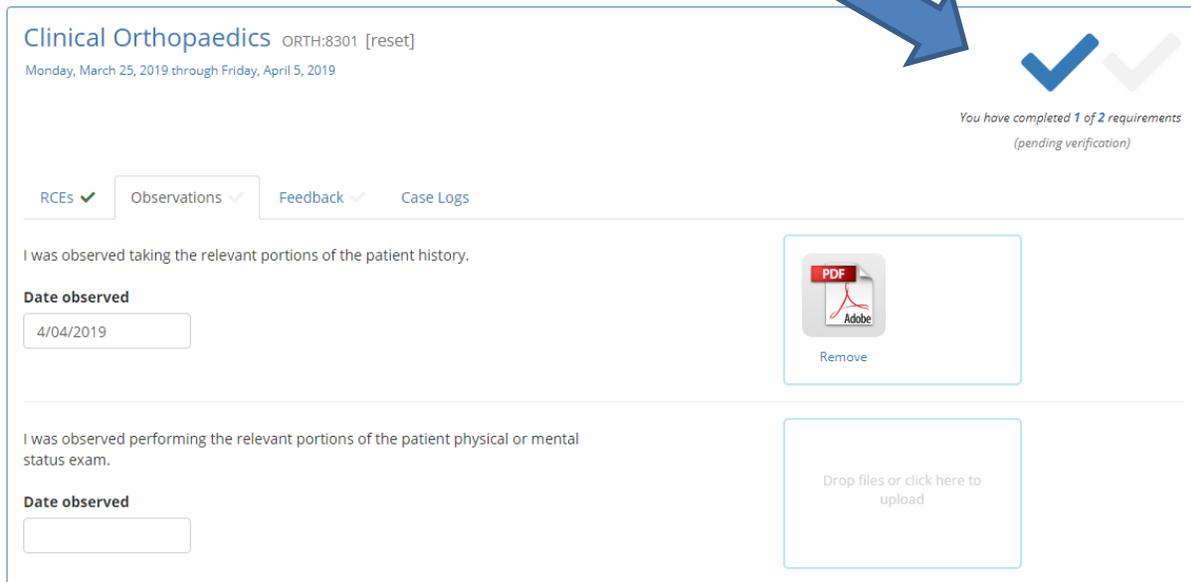
The system automatically highlights to the current date but students can go back in time and select a date up until the first day of the clerkship or up to 14 days previous on the current clerkship. Students may not log into the future or for previous clerkships.

The screenshot shows a web form interface. A calendar pop-up is open, displaying the month of April 2019. The date '4' (April 4th) is highlighted in blue. Below the calendar is a date input field containing '4/04/2019'. To the right of the calendar, there is a text input field with 'S ORTH:8301 [reset]' and a date 'April 5, 2019'. Below these are two buttons: 'Feedback' with a checkmark and 'Case Logs'. Further down, there is a text area with the text 'I was observed performing the relevant portions of the patient physical or mental status exam.' and a label 'Date observed' above an empty input field.

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.



Clinical Orthopaedics ORTH:8301 [reset]  
Monday, March 25, 2019 through Friday, April 5, 2019

You have completed 1 of 2 requirements  
(pending verification)

RCEs ✓ Observations ✓ Feedback ✓ Case Logs

I was observed taking the relevant portions of the patient history.

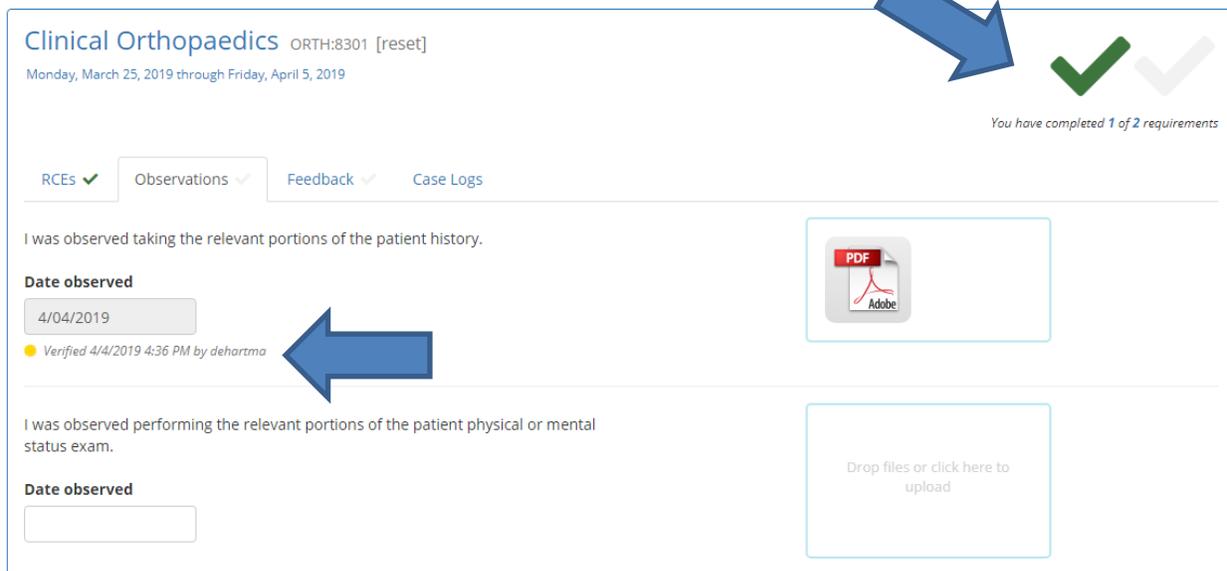
**Date observed**  
4/04/2019

I was observed performing the relevant portions of the patient physical or mental status exam.

**Date observed**

Drop files or click here to upload

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.



Clinical Orthopaedics ORTH:8301 [reset]  
Monday, March 25, 2019 through Friday, April 5, 2019

You have completed 1 of 2 requirements

RCEs ✓ Observations ✓ Feedback ✓ Case Logs

I was observed taking the relevant portions of the patient history.

**Date observed**  
4/04/2019  
Verified 4/4/2019 4:36 PM by dehartma

I was observed performing the relevant portions of the patient physical or mental status exam.

**Date observed**

Drop files or click here to upload

## Core Clerkship Mid-Clerkship Feedback Check-In

The mid-clerkship feedback check-in process for Core Clerkships will be completed in a different process through Qualtrics. Students will need to refer to information posted on clerkship ICON sites for more information. Students on core clerkships will not need to upload or post anything for mid-clerkship feedback in Clerx unless otherwise directed by their clerkship.

## Selective 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.

The screenshot displays the 'Feedback' tab in the Clerx system for a 'Community Based Primary Care' clerkship (MED:8301). The interface includes a progress indicator showing 13% completion (2 of 15 RCEs) and a 'New Case Log' button. The 'Feedback' tab is selected, and a blue arrow points to it. The grid of tasks is as follows:

Task Name	Completion Status
Complete Physical (any age)	Complete one of these tasks
Diabetes Mellitus	You have completed this RCE
Exam: HEENT	Complete this task
Gastrointestinal Disorders	You have completed this RCE
Goals of Care Counseling	Complete one of these tasks
Hyperlipidemia	Complete this task
Hypertension	Complete this task
Mental Health Counseling	Complete this task
Motivational Interviewing	Complete one of these tasks
Musculoskeletal Disorders	Complete one of these tasks
Pharmacotherapy Counseling	Complete one of these tasks
Residential Facility Patient Care	Complete this task
Respiratory Disorders	Complete one of these tasks
Substance Misuse Counseling	Complete one of these tasks
Thyroid Disorders	Complete one of these tasks

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.

Clinical Orthopaedics ORTH:8301 [reset]  
 Monday, March 25, 2019 through Friday, April 5, 2019

You have completed 0 of 1 requirement

RCEs ✓ Observations ✓ Feedback ✓ Case Logs

I was provided mid-clerkship feedback.

Date of feedback

Feedback was provided by

Drop files or click here to upload

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.

« January 2019 »

Su	Mo	Tu	We	Th	Fr	Sa
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

Clear

Primary Care MED:8301 [reset]  
 Wednesday, January 9, 2019

Feedback ✓ Case Logs

I was provided mid-clerkship feedback.

Feedback was provided by

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: 1/09/2019

Feedback was provided by: JETTON, JENNIFER

Feedback was provided by: JETTON, JENNIFER

IC ABENDROTH, Matthew  
ABOSAIDA, ALLADDIN  
ABU ANZA, OMAR  
AGNEBERG, RACHEL  
AHRENDSEN, ANDREA

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.

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: 1/09/2019

Feedback was provided by: JETTON, JENNIFER

You have completed 1 of 1 requirement (pending verification)

PDF Adobe

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.

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: 1/09/2019  
Feedback was provided by: JETTON, JENNIFER

Verified 1/9/2019 3:14 PM by dehartma

You have completed 1 of 1 requirement

## 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 30<sup>th</sup> 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

## Collegiate Requirements

It is recommended that these requirements be completed by December 31st of your M4 year; in order to graduate they MUST be completed by April 30th of your M4 year.

0%

You have completed 0 of 2 requirements

### Exam: Male Prostate Exam

Complete this task

Male Prostate Exam ✓

### Phase III: Overnight Call (24 hour shift, no night float)

Complete **three** of these tasks

Advanced Elective ✓

Intensive Care ✓

Sub-internship ✓

**If you have any questions about the Clerx system or encounter an error, please contact:**

Dana Hartman, M.Ed.

Clinical Curriculum Specialist

[dana-hartman@uiowa.edu](mailto:dana-hartman@uiowa.edu)

*Updated 1/6/25 by Dana Hartman*