

Competency, Training, and Best Practices for Clinical Chaperones

Chaperones are an integral part of healthcare teams and serve as objective observers who can verify what was said and done during sensitive exams and procedures. Their presence can reinforce patients' sense of safety, comfort, and dignity during times when they might feel vulnerable. Chaperones also support healthcare providers by facilitating communication, helping clarify misunderstandings, and serving as witnesses to clinical encounters.¹

Chaperones may have different responsibilities and duties depending on their backgrounds and organizational policies. For example, medical assistants who serve as chaperones might also have responsibilities for setting up exam rooms, doing patient intake, and helping with certain tasks during exams and procedures. In other instances, chaperones might serve only in the role of observer.

Because of this variation, healthcare organizations should develop [chaperone policies](#) that comply with state laws. These policies should set forth who can serve as a chaperone, explain any differences in how the organization will use licensed and unlicensed personnel as chaperones, and describe the necessary education, training, qualifications, and competencies that chaperones must possess.

The following checklist can help organizations review their existing chaperone policies and identify potential improvement opportunities. This tool is not all-inclusive, nor does it imply that every question should apply to every organization. However, it offers key considerations related to chaperones and provides a basis on which to reinforce approaches that protect patients and clinical staff.²

	Yes	No
Do chaperones adhere to your organization's code of conduct and its expectations for professionalism and ethical behavior within the healthcare organization?	<input type="checkbox"/>	<input type="checkbox"/>
Do chaperones allow adequate time for patients to have private discussions with their healthcare providers at the beginning or end of appointments?	<input type="checkbox"/>	<input type="checkbox"/>

	Yes	No
<p>Do chaperones receive training on factors to pay attention to during exams and treatments, such as verifying whether providers:</p> <ul style="list-style-type: none"> • Leave the room and allow patients adequate time to disrobe? • Wear gloves during all sensitive exams and procedures? • Ask patients for permission to touch them? • Explain what they are doing as they are doing it? • Keep patients appropriately draped and covered as much as possible? • Encourage patients to speak up if they are uncomfortable? • Only examine areas of the patient’s body that are clinically necessary and for which they have obtained consent? • Avoid verbal comments that make patients uncomfortable or violate professional boundaries? • Avoid touching the patients in ways that seem overly familiar or sexual (e.g., groping, rubbing, hugging, etc.)? 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<p>Do chaperones also pay attention to patients’ physical, verbal, and nonverbal behaviors and cues during exams and treatment to help identify distress, discomfort, and/or unusual behavior?</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>Do chaperones know how to professionally and discretely intervene during patient encounters if they witness patient discomfort or notice something unusual or inappropriate?</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>Do chaperones use verbal prompts to communicate key information to healthcare providers during patient encounters, such as prompts to (a) remind the provider to communicate with the patient, (b) indicate that they can’t see the point of physical contact, (c) briefly stop the examination or procedure due to patient discomfort, or (d) completely stop the examination or procedure due to significant discomfort on the part of the patient or chaperone?</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>Do chaperones receive guidance on the organization’s reporting policies, and do they know when, how, and to whom to report behaviors or actions that seem unusual, inappropriate, or conflict with organizational policies?</p>	<input type="checkbox"/>	<input type="checkbox"/>

	Yes	No
<p>Do chaperones receive training on the organization’s documentation policies, and do they know their documentation responsibilities vs. the healthcare provider’s responsibilities (e.g., documenting the presence of the chaperone or documenting a patient’s refusal of a chaperone)?</p> <ul style="list-style-type: none"> Do chaperones document any unusual or out-of-the ordinary comments or behaviors that they witness from providers or patients, and do they sign and date the documentation? Do chaperones use objective language when documenting and avoid subjective statements that make judgments or accusations? 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<p>Do chaperones receive training on privacy, confidentiality, security, and HIPAA compliance, and are they aware of their obligation to strictly adhere to all federal and state laws as well as organizational policies?</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>Do chaperones receive training in the principles of trauma-informed care, and do they apply these principles in practice (e.g., being mindful of visual cues that the patient is anxious or uncomfortable and working to create a psychologically safe environment for the patient)?</p>	<input type="checkbox"/>	<input type="checkbox"/>

Learn More

To learn more about the use of chaperones and other strategies for avoiding boundary violations and preventing allegations of sexual misconduct, see MedPro’s on-demand continuing education programs titled [Sexual Misconduct: Crossing Professional Boundaries](#) and [Sexual Misconduct: Risk Strategies and Insights](#).

Endnotes

¹ PBI Education. (n.d.). *PBI medical chaperone training program*. Retrieved from <https://pbieducation.com/>; McCue, D. (2023, June 2). *Chaperone education from OHSU Health*. Oregon Medical Board. Retrieved from www.oregon.gov/omb/Topics-of-Interest/Documents/OHSU%20Chaperone%20Education%20Course%20Slides.pdf

² Ibid.; Ernst, S., Mortenson, L., & Ware, M. (2019). *Chaperoning sensitive examinations: Policies, guidelines, competencies and moving forward with a better system for patient safety*. Michigan University Health Service. 2019 American College Health Association National Conference. Retrieved from https://portal.acha.org/app_themes/AM19/documents/handouts/39.0-90338-Missy-Ware_novideo.pdf; Florida Academic Healthcare Patient Safety Organization. (2021). *Consensus recommendations of the Florida Academic Healthcare Patient*

Safety Organization for the use of medical chaperones during sensitive examinations. Retrieved from https://flbog.sip.ufl.edu/wp-content/uploads/2021/08/FAH_PSO_Use_of_Medical_Chaperones.pdf; The MDU. (2025, April 29). *Chaperones.* Retrieved from www.themdu.com/guidance-and-advice/guides/guide-to-chaperones

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