Pharm 354

Preceptor Course Review

SPRING 2019

Experiential Education Program

Faculty of Pharmacy and Pharmaceutical Sciences

UofA

Renette Bertholet: renette@ualberta.ca

Course Coordinator and Community Practice Coordinator
• Preceptor Resources
• Course Overview
  • What’s New?
  • Assignments
  • Activities
  • Assessments
• Preceptor Roles and Responsibilities
• Contact information
Preceptor Resources

• U of A Pharmacy Faculty Website
  https://www.ualberta.ca/pharmacy/preceptors
• Go to Course Information
• Course information & tools, podcasts, syllabi, calendars

• Training and Resources
  • Preceptor Guide
  • Experiential Program Policies and Procedures Manual
  • Patient Care Process Module Podcasts
  • ACP Continuing Competence Program Resources
  • Library Access Form

• Preceptor Benefits and Awards

Check it out!
Quick Reference Guide

• Emailed via CORE ELMS about 1 month prior to start of placement
• Quick links: Course Syllabus, calendar template
• Checklists: orientation. Activities, assignments, assessments, care plan review
• Summaries: Overview of on-campus resources, expectations of students.
CORE ELMS: Finding student information
Students post their Resume/CV – 1 month prior, Learning plan – 1 week prior

CORE ELMS

- Students to post their CV/Resume and Learning Plan under Student Requirements.....viewable by preceptors when they login and select their student from drop-down menu.
Course Overview

TIP: have the Preceptor Quick Reference Guide handy as you listen
Pharm 354 – similar to Pharm 305 with just a few changes besides the name ......
Placement Dates

• Block 1: May 6 – May 31, 2019
• Block 2: June 3 – 28, 2019

* Stat: Monday, May 20; preceptor discretion
What’s Changed from Last Year

• Students - First year of the Entry to Practice
  • New curriculum
    • Pharmacotherapy course = respiratory, self care, CAM
    • Practice skills lab every week

• Course
  • Removal of early assessment
    • Still important to do check in with student at the end of week 1 to see how things are going
  • Re-added – Final Student Evaluation of Preceptor and Site
  • NEW Patient Care Process Form (same but different!)
  • Changed assignments:
    • #1: Students Learning Plan
    • #2: Post 1 care plan
    • #3: Medication safety assignment (different assignment)

• Activities
  • Still doing Inter-professional activity but not posting as an assignment
  • Similar to previous years. Check list for OTC conditions added.
Pharm 354: Course Objectives

Syllabus - Appendix 1

• **Professional:** acts professionally
• **Communicator:** communicates effectively
• **Scholar:** demonstrates fundamental knowledge and critical thinking
• **Care Provider:** provides patient care using the patient care process for uncomplicated patients
• **Collaborator:** collaborates effectively
• **Manager-Leader:** demonstrates fundamental knowledge of the medication use process
• **Advocate:** for patients and the profession
Pharm 354: Course Objectives

FOCUS:
• introduction to community pharmacy practice
• practice basic skills; including communication
• participate in patient care
• socialization in the profession
• activities and discussions allow student to learn about pharmacist practice in a community setting.
• build basic skills & apply what they learned in classroom and skills labs
• observe pharmacist role; providing patient care, use of clinical judgment and decision making to improve patient outcomes
What’s **Not** New But Still Important

- emails from CORE ELMS
- Absence Tracking through CORE ELMS
- Professionalism: initiative, appropriate appearance, punctual
- Communication: verbal and written
- Patient Care activities
  - Medical and Medication Histories
  - Patient Counselling of Prescription and OTC Topical Preparations
- Collaboration with dispensary team & other health professionals
- Health Advocacy
- Drug Information questions
- Drug Distribution process
Course Activities and Assignments

Brief Review to highlight changes
Refer to *Quick Reference Guide* for further information
Syllabus – Appendix 2 – Schedule for Assessments and Assignments
Assignment #1 Learning Plan:
posted in COREELMS at least 1 week prior to start of placement to allow you to review (in “requirements”)

**Part 1: Student Skills Inventory (acts as “self assessment”)**

- Students rate their level of “comfort” performing select skills prior to starting the placement.

### Skills Inventory – Part 1 (complete and discuss with preceptor(s)).

**Skills Inventory (indicate ratings)**

<table>
<thead>
<tr>
<th>Skill Development in Pharm 305 and Skills Lab</th>
<th>Student considers their ability to:</th>
<th>Comfort Scale</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Engage/greet patient</td>
<td></td>
<td>1 2 3 4 5 6 7</td>
</tr>
<tr>
<td>- Speak clearly with appropriate confidence.</td>
<td></td>
<td>Uncomfortable</td>
</tr>
<tr>
<td>- Listen in a way that picks up patient cues and adapt responses.</td>
<td></td>
<td>Comfortable</td>
</tr>
<tr>
<td>- Explore patient’s perspective</td>
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</table>

<table>
<thead>
<tr>
<th>Communicating with patients</th>
<th></th>
<th>Amount of Practice Scale</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Engage/greet patient</td>
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<td>1 2 3 4 5 6 7</td>
</tr>
<tr>
<td>- Speak clearly with appropriate confidence.</td>
<td></td>
<td>Limited Practice ++ Practice</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Gathering medical and medication history (Med Rec and BPMH)</th>
<th>- Introduce self and establish rapport - Gather sufficient information while having a 2-way discussion in a conversational manner.</th>
<th>Comfort Scale</th>
</tr>
</thead>
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<td>- Engage/greet patient</td>
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| Amount of Practice Scale                                  | 1 2 3 4 5 6 7 |
Learning Plan **Part 2:**
Posted as requirement in CORE ELMS with Skills inventory

**Students will**

- State 1 goal they are working on using SMART format.
- Post Learning Plan template along with Skills Inventory
  - at least 1 week prior to the start of placement to allow preceptor to review.
- Preceptor & student discuss & finalize goal & details
  - during first few days of placement and student will post revised Learning Plan on CORE ELMS.
- Discuss progress achieved for Learning Plan goal with preceptor at **midpoint and final**.
- Post revised Learning Plan both at midpoint & final

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**Learning Goal (Use SMART format):**

Why is this goal important to you? How will it enable you to be a better pharmacist?

Describe the resources and strategies you will use to enable you to achieve your learning goal.

**Indicators of Progress:** State the indicators that will inform you of your progress or achievement across the 4 weeks.

**Progress at MIDPOINT (end of wk 2)**
Summarize:
What has been achieved thus far?
What needs to be the focus in the next 2 weeks? Do I need to add any goals (on separate sheet) based on my Midpoint Student Performance

Student to type progress here.
CARE PROVIDER: Preceptor Tips and Suggestions

• Prepare with student prior to initiating activity
  • discuss steps involved, discuss your expectations
  • student should observe preceptor complete 1 patient interview
  • student should prepare & share with preceptor their planned approach
• Students conduct session/activity with supervision/observation initially; may be able to have indirect supervision after preceptor comfortable with demonstrated skills. Then
  • debrief with preceptor
  • preceptor provides feedback to student
• Patient profile documentation; may require practice, should have clear intent & include only relevant information
• ALL care plans and documentation should be reviewed by preceptor
Assignment #2 Care plan

• Students to post 1 care plan, reviewed and acceptable per preceptor, where student interviewed and provided care to the patient that includes
  • BPMH
  • DRP identification
  • Therapeutic alternatives with pro/cons
  • Recommendation/rationale
  • Implementation plan
  • Documentation
  • Follow-up if applicable

• Students must complete a MINIMUM of 4 care plans (as above) but only 1 posted.

• Should have MIN of 1 at midpoint

• Reminder: Patient Care Process eModules on Faculty webpage: https://www.ualberta.ca/pharmacy/preceptors/preceptors/resources/training/patient-care-process-module-podcasts
When using, think about level of student and topics/skills already covered in curriculum to date. Students will likely require assistance for therapeutics areas they have not yet covered.

<table>
<thead>
<tr>
<th>Pharmacy Care Plan Worksheet with Checklist</th>
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</table>
| **MEDICAL CONDITIONS & MEDICAL RELATED NEEDS:** List and prioritize each medical condition first, followed by any DRPs identified for a given condition. Although some medical conditions may not have a DRP, a care plan is still necessary for ongoing patient monitoring.
| **DRP Categories:** unnecessary drug ● drug therapy required ● ineffective drug ● dose too low ● adverse drug reaction/interaction ● dose too high ● nonadherence |

- Are all DRPs identified (based on 4 prime areas of indication, efficacy, safety, adherence)?
- If no, discuss with student; probe to see if those missing can be determined.
- Is rationale provided or discussed for DRPs (based on either patient or provider data)?

| **GOALS OF THERAPY:** For each medical condition and/or DRP state desired goals of therapy/timeframe. Goals: cure, prevent, slow/stop progression, reduce/eliminate symptoms, normalize a lab value. Consider realistic goals determined through patient discussion. Goals of therapy are measurable or observable parameters that are used to evaluate the efficacy and safety of therapy. |

- Therapeutic goal/outcome(s) stated?
- Patient goal incorporated (if appropriate)

| **ALTERNATIVES:** Compare relevant drug and non-drug therapies that will produce desired goals. List the pros and cons of each therapy as well as rationale for each being included. Consider: Indication ● Efficacy ● Safety ● Adherence ● Cost/coverage |

- Is an assessment of each DRP provided (factors considered to influence/determine a plan)?
- Are alternatives (with rationale for each) provided that would be considered acceptable for current level of student(s)?

| **RECOMMENDATIONS/PLAN:** In collaboration with the patient and other health care providers, select the best alternative and implement the plan. Provide a rationale for the chosen plan relative to the other alternatives considered. Consider: Drugs: correct drug, formulation, route, dose, frequency, schedule, duration, medication management. Non-drug: non-drug measures, education, patient referral. |

- Plan/recommendations are outlined
- Includes:
  - dosing considerations
  - patient preferences

<table>
<thead>
<tr>
<th><strong>ACTIONS TAKEN</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Appropriate/acceptable action has been taken</td>
</tr>
</tbody>
</table>
Assignment #3 Mediation Safety

• Students to
  • Review the ACP “Drug Error Management Module – Part I, II and III”
  • Review the ACP Sample Drug Incident Report form
  • Resolve a real or hypothetical medication error using the ACP Drug Incident Report Form
  • Review and discuss with preceptor
# Notable Activities

<table>
<thead>
<tr>
<th>Outcome</th>
<th>Activity (examples – not inclusive list)</th>
</tr>
</thead>
</table>
| Care provider | Minimum of 3 patient interviews (1 per week)  
Write and discuss with preceptor 4 simple SP notes for care provided to patients |
| Scholar       | Satisfactorily research, respond and document MIN 3 drug info queries (info from >1 source for each question)  
For one patient with multiple perspectives, reflect on what makes the decision difficult from the pharmacists perspective, the patients and possibly the physician |
| Care Provider | 4 patient interviews – BPMH (site form or form on eClass)  
4 Care plans  
Educate at least 1 patient on inhalers and devices, on each of the self-care topics covered in year 1 (see Appendix 5).  
Students to create a care plan worksheet on a counseling experience, and DAP note |
| Collaborator  | IP ACTIVITY: Students will spend a minimum of 20 minutes with another health care Practitioner (MD, PT, OT, Rn, Dietician, etc). Pre-brief, give HCP IP shadowing form to complete, reflect, send thank you, discuss |
| Manager-Leader| Participate in the dispensing process for MIN of 40 patients (20 new, 20 refills) to ensure complete as per ACP  
Prepare simple compounds |
| Advocate      | Health Promotion Activity at the pharmacy or in the community  
creating sun safety or first aid display, diabetes or blood pressure screening day at pharmacy, giving presentation to seniors group or school. Most students will need some degree of help  
Group activity is fine if there are other students in the community |
Discussions – Syllabus Appendix 3

• The students are provided with discussion topics to have with their preceptors
• Although it is the students responsibility to keep track of what discussion they must complete, scheduling a time is a joint effort
• For each outcome there are discussion activities (ie)

<table>
<thead>
<tr>
<th>Outcome</th>
<th>Discussion Activity examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professionalism</td>
<td>Discuss professional norms expected of a pharmacist? What strategies does the preceptor use to achieve professional behavior? How does the student demonstrate this during the placement? Do your ideas and strategies align with your preceptor?</td>
</tr>
<tr>
<td>Communication</td>
<td>Discuss modes of communication used between team members (written, verbal) and with other health care professionals.</td>
</tr>
<tr>
<td>Scholar</td>
<td>Discuss benefits and implications of Netcare</td>
</tr>
</tbody>
</table>
Assessments

1. Assessments Preceptors complete of student
2. Assessments STUDENTS complete
3. Course Evaluations
Assessments

• Only 1 primary preceptor assigned to student
  • ensure comments are shared between preceptors
• Options to complete assessment when > 1 preceptors:
  • Primary preceptor logs in for other preceptor; enter their comments.
  • Primary Preceptor shares their CORE password with other preceptor so each has access. password can be changed: “reset password” on CORE landing page
  • Print assessment forms; share with other preceptor to write comments
• Review assessments in CORE before student starts
• Viewable by student after submitted: can save as a draft
• Important to discuss with student and acknowledge on the form.
Student Performance Assessment:

• Preceptors provide **overall mark** for each outcome:
  • *Not Meeting* an Acceptable level of performance
  • *Needs Improvement* to Reach an Acceptable Level of Performance
  • *Meets* Acceptable Level of Performance
  • *Exceeds* an Acceptable Level of Performance

• Needs Improvement: **OK at MIDPOINT**
  • more practice, effort & time you think student will pass

• Not Meeting an Acceptable Level of Performance: **indicates major concerns.** Faculty must be notified by midpoint at latest

• Unable to rate (midpoint): use if you have not had opportunities versus using Needs improvement

• Assessments are reviewed by Faculty. You may be contacted by Faculty at midpoint if concerning comments/ratings
  • to check in, gather more information, offer support
New Grading Policy: FINAL Student Performance Assessment

**NEW CRITERIA:** To PASS Students must;

1. Achieve a rating of “Meets an Acceptable Level of Performance” on all **Professionalism outcomes AND**

2. Have no more than 3 (**Maximum of 2 for Care Provider**) outcomes achieve a rating of “Needs Improvement to Reach an Acceptable level of Performance” **AND**

3. Have ZERO ratings of “Not Meeting an Acceptable Level of Performance”
Student Performance Assessment: Example

CARE PROVIDER - provides patient care using the patient care process for uncomplicated patients

Please provide an overall rating for each of the Care Provider outcomes.

<table>
<thead>
<tr>
<th>Care Provider Outcome 1: Develops and maintains professional relationships with patients/caregivers</th>
</tr>
</thead>
<tbody>
<tr>
<td>· Engages patient; may require some preceptor prompting and guidance</td>
</tr>
<tr>
<td>· Exhibits sensitivity, respect and empathy with patients and caregivers.</td>
</tr>
<tr>
<td>· Identifies/responds to patient cues with guidance</td>
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</table>

<table>
<thead>
<tr>
<th>MIDPOINT</th>
<th>FINAL</th>
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</thead>
<tbody>
<tr>
<td>Required</td>
<td></td>
</tr>
<tr>
<td>· Exceeds an Acceptable level of Performance</td>
<td></td>
</tr>
<tr>
<td>· Meets an Acceptable Level of Performance</td>
<td></td>
</tr>
<tr>
<td>· Needs Improvement to Reach an Acceptable Level of Performance</td>
<td></td>
</tr>
<tr>
<td>· Not meeting an Acceptable Level of Performance</td>
<td></td>
</tr>
<tr>
<td>· Unable to Rate (Midpoint Only)</td>
<td></td>
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</tbody>
</table>

Save work frequently when completing!
## Assessments: Preceptors Complete

<table>
<thead>
<tr>
<th>Assessment /Evaluation</th>
<th>Completion</th>
<th>Comments</th>
</tr>
</thead>
</table>
| **Midpoint** Student Performance Assessment | End of **Week 2** of placement | - Assess behaviours/skills associated with learning outcome areas  
- End of form; *Identification of Expectations & Areas for Focus* for rest of placement; discuss with student  
- NOTE: Student adds all areas that Needs Improvement to Learning Plan  
- NO GRADE GIVEN (pass or fail) |
| **Final** Student performance Assessment | End of **Week 4** of placement | - Behaviours/skills assessed same as midpoint  
- “Placement Grade” given preceptor; PASS or FAIL  
- Faculty provides “Course Grade” |
| **Preceptor** Evaluation/Survey | End of placement | - Link to survey emailed; not RxPreceptor  
- Comments appreciated! (~ 5-10 mins to complete)  
- Anonymous; can request Faculty to contact you |
# Assessments: Students Complete

<table>
<thead>
<tr>
<th>Assessment/ Evaluation</th>
<th>Completion</th>
<th>Comments</th>
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| Student Self Assessments; **Midpoint and Final** | End of Week 2 and End of Week 4 of placement | - Compare Student Performance Assessment (completed by preceptor) with Student Self Assessment  
- At midpoint, student should provide this to you 1-2 days in advance of assessment review  
- At final; include in final assessment review; good comparator |
| Assessment of Preceptor and Site; **Midpoint and Final** | End of Week 2 and Week 4 | - To be discussed with preceptor |
| 1. Course Evaluation  
2. Post Course Preceptor and Site Evaluation | End of Week 4; after student has completed course | - Comments about all aspects of the course  
- Final quality assurance check |
Assessment Tips

• Assessment webinar – 14 minutes long – provides rationale for assessments – available on U of A Preceptor training and resources page
• Discuss assessments with student; acknowledgement on form
• Discourage use of “Exceeds” at midpoint unless student is outstanding
• Comment boxes are helpful for student & Faculty; be specific
• Midpoint Identification of Goals:
  • *After midpoint assessment* important to discuss “action plan”
  • Student will add outcomes that received “Needs Improvement” to their midpoint Learning Plan to ensure that they are addressed.

• What if student clearly is struggling, needs improvement or you have concerns???
  • **CONTACT THE FACULTY ASAP**; Renette
  • You do not need to wait until midpoint if concerned
Preceptor Roles and Responsibilities

Expectations, Pre-Placement Planning, Policies and Procedures
Preceptor Expectations of Students

Guiding Principles

- As each placement progresses, students are expected to incorporate knowledge and skills and provide care with more confidence.
- Students expected to embody and demonstrate attitudes and behaviors a pharmacist (effective communication, professionalism, team player).
- Students expected to identify areas for development and demonstrate initiate regarding self-directed learning.
Preceptor Roles

• Preceptors are guides: provide direction
• Preceptor roles: direct instruction, role modeling, coaching and facilitation
• PH 354 is an Introductory placement: preceptor usually providing direct instruction, modeling & coaching
  • student observes preceptor → student assists preceptor → student performs while preceptor observes → student performs independently
• Guiding principle: ensure patient safety
• Provide regular feedback; debriefing before and after activities
  • Spend time daily, especially at start
  • Review when you will provide feedback at orientation
• Review documentation: care plans, DAP notes
• Contact us if needed
Planning

• Primary preceptors sent email ONE month prior to start with info and resources such as a modifiable schedule, Quick reference Guide,

• Ensure you can log into CORE ELMS;
  • contact: phexed@ualberta.ca or 780-492-3362 with any concerns: log-in, etc
  • View your students information (students to post 1 month prior to start)
  • Important to confirm at least 3 weeks prior to start of placement that you have reviewed their information CV/resume
  • Provide them with information: start time, pre-readings etc

• Develop “Preliminary” Schedule
  • weekend & evenings OK
Policies and Procedures

• Ex ED Policies and Procedures manual: posted on website Guide

• Attendance: 40 hours/week; 5 x 8 hour days
  • Stat holidays; preceptor’s discretion

• Absences:
  • students must record request in CORE ELMS Absence Tracker;
  • Requests must be authorized by preceptor and feasible with placement schedule: you confirm/deny
    • Sickness: if > 1 day missed, time must be made up
    • Bereavement (for family member); same as above
    • Contact faculty for guidance

• Change of schedule outside of stated timelines must be approved by course coordinator in advance of change

• Schedule routine medical appts outside of course time

• If unsure best to check with us!
What To Do?

• If you are going to be away (for many days) during the placement, and no co-preceptor, please advise the student AND US

• If you think you have a problem, you may, don’t hesitate to contact us ASAP

• Please call Faculty early

• Important:
  • Tell student your concerns as well as what they do well (and should keep doing)
  • Provide specific feedback
  • Document with specific examples
  • Advise student to contact faculty if struggling
Questions?? Who do I contact?

• Administrative questions: (CORE ELMS)
  • phexed@ualberta.ca or 780.492.3362
• Netcare: Netcare help desk
• Otherwise contact course coordinator
  • Renette Bertholet: renette@ualberta.ca 780-492-8066