Preceptor Development: Patient Care Process
• Setting the stage for precepting the pharmacy care plan
• Elements of the pharmacy care plan
• Feedback and evaluation of your student
• Overview of the preceptor role
• An example: my practice
1. Evaluate and identify how you create and implement a pharmacy care plan

Discuss your role as a pharmacist with the various aspects of the care plan.

- What is the flow of patient care like at your work site?
- Do you work independently or collaboratively?
- What is your scope of practice?
- How do you implement your care plans?
- Do you have prescribing authority? Are you able to order labs?
- Who typically provides monitoring and follow-up?
- How do seamless care and communication occur with other health care givers?
2. Get to know your student
   • How much experience have they had in creating care plans?
   • Implementing care plans?

3. Share your approach and expectations for developing and implementing a pharmacy care plan
   • What are the student’s responsibilities?
   • How independently can the student work initially and as the clinical placement progresses?
<table>
<thead>
<tr>
<th>MEDICAL CONDITIONS AND/OR DRPs</th>
<th>GOALS OF THERAPY</th>
<th>ALTERNATIVES</th>
<th>RECOMMENDATIONS/PLAN</th>
<th>MONITORING PARAMETERS</th>
<th>FOLLOW-UP</th>
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<td>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. <strong>DRP Categories:</strong> unnecessary drug • additional drug required • ineffective drug • dose too low • adverse drug reaction/interaction • dose too high • nonadherence</td>
<td>For each medical condition and/or DRP state desired goals of therapy/timeframe. <strong>Goals:</strong> 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.</td>
<td>Compare relevant drug and non-drug therapies that will produce desired goals. List the <strong>pros</strong> and <strong>cons</strong> of each therapy. <strong>Consider:</strong> Indication Efficacy Adherence Safety Cost/coverage</td>
<td>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. <strong>Consider:</strong> Drugs: correct drug, formulation, route, dose, frequency, schedule, duration, medication management. Non-drug: non-drug measures, education, patient referral.</td>
<td>Determine the parameters for monitoring <strong>efficacy</strong> and <strong>safety</strong> for each therapy. <strong>Consider:</strong> Clinical &amp; laboratory parameters The degree of change The time frame</td>
<td>Determine <strong>who, how and when</strong> follow-up will occur.</td>
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Adapted with permission from the Division of Pharmacy Practice, Leslie Dan Faculty of Pharmacy, University of Toronto, 2011.
• Medical conditions and/or DRPs
  • Although some medical conditions may not have a DRP, a care plan is still necessary for ongoing patient monitoring.

• Goals of therapy
  • Realistic and patient-centered

• Alternatives
  • Compare realistic & relevant drug & non-drug therapies; list pros/cons.

• Recommendations/Plans
  • Provide rationale for chosen plan. Be proactive! Have a few back-up plans.

• Monitoring Parameters
  • Include parameters for efficacy and safety for each therapy.

• Follow-up
  • Who, how and when will follow-up occur?
• A consistent and comprehensive approach on how to manage drug-related issues once an assessment is complete

• The worksheet is:
  • a **tool** for students to write down their thoughts in a systematic way (in point form) **WHICH**
  • Facilitates discussion with you, the preceptor, **AND**
  • Allows for evaluation of their plan

**PRECEPTING TIP:**
The worksheet is **NOT** a documentation form.

Documentation should flow from this worksheet.
• Provide feedback to your student on each component of the care plan:
  • Assess for completeness
  • Is the suggested plan reasonable and acceptable?
  • Which aspect is unacceptable?
  • What improvements need to be made?

• Evaluate your student:
  • Use the checklist provided to review their written care plan and provide written feedback as required by the course.

**PRECEPTING TIP:** Ensure the student is developing specific monitoring and follow-up plans that the pharmacist will conduct.

**Note:** If student is unable to appropriately create a pharmacy care plan despite feedback and sufficient practice, please contact the course coordinator.
# Checklist for Evaluating Care Plans

**PHARMACY CARE PLAN WORKSHEET with CHECKLIST FOR ASSESSMENT**

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<td>For each medical condition and/or DRP identified, create an integrated pharmacy care plan. 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. <strong>DRP Categories:</strong> <strong>Indication:</strong> 1. Unnecessary drug therapy, 2. Needs additional Drug Therapy, <strong>Effectiveness:</strong> 3. Ineffective Drug, 4. Dosage too low, <strong>Safety:</strong> 5. Adverse Drug Reaction (includes drug interactions), 6. Dosage too high, <strong>Compliance:</strong> 7. Non-adherence/compliance.</td>
<td>For each medical condition and/or DRP state desired goals of therapy. <strong>Goals:</strong> 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).</td>
<td>Compare relevant drug and non-drug therapies that will produce desired goals. List the pros and cons of each therapy. (Consider indication, efficacy, safety, adherence and cost/coverage).</td>
<td>In collaboration with the patient and other providers, select the best alternative and implement the plan. Provide a rationale for the chosen plan. <strong>Consider:</strong> Drugs: consider drug, formulation, route, dose, frequency, schedule, duration, medication management. Non-drug: non-drug measures, education, patient referral.</td>
<td>Determine the parameters for monitoring the efficacy and safety for each therapy. (Consider clinical and laboratory parameters, the degree of change and the time frame).</td>
<td>Determine who, how and when follow-up will occur.</td>
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☐ Are all DRPs identified (based on 4 prime areas of indication, efficacy, safety, medication organization/adherence)?
☐ If no, discuss with student and probe to see if those missing can be determined.

☐ Are DRPs prioritized in an acceptable manner?
☐ Is rationale provided or discussed for DRPs (based on either patient or provider data)?

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

☐ Is an assessment of each DRP provided (factors considered to influence/determine a plan)?
☐ Are alternatives (with rationale for each) provided?

☐ Plan/recommendations are outlined

- Includes:
  - dosing considerations
  - patient preferences

- ACTIONS TAKEN
  - Appropriate/acceptable action has been taken

☐ Monitoring plan present

- Includes:
  - safety
  - efficacy
  - frequency
  - duration (if appropriate)
  - which healthcare provider will follow-up

☐ Follow-up plan present

- Includes:
  - who
  - how
  - when

- Includes outcome (if possible)
Overview of Preceptor Role

Before the clinical placement
• Be familiar with the pharmacy care plan process student’s are taught
• Know the number and variety of care plans required by the Faculty

Early in the clinical placement
• Provide plenty of guidance on implementing care plans
• Get to know your students strengths and areas for improvement. Discuss your expectations for creating and implementing each element in a pharmacy care plan
• Discuss when you will provide routine feedback and evaluation on your student’s patient care activities

Later in the clinical placement
• Challenge the student with more complex patients
HIV Ambulatory Practice- Northern Alberta Program, RAH site

My role and responsibilities

How data is collected and assessed

Developing a care plan

How the plan is implemented

How documentation occurs

Tips for the student as they go through the process