

## Preceptor Training Program



The University of Louisiana at Monroe  
College of Pharmacy

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## Forward/Acknowledgements

*This document is a compilation of our ideas and the thoughts and work of many others in the field.*

In particular, we wish to bring to your attention:

- The Mountain AHEC Office of Regional Primary Education (ORPCE) *Preceptor Development Program*
- The FIPSE project group, Office of Educational Development, University of North Carolina School of Medicine for *The Expert Preceptor Interactive Curriculum*

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## Goals

- Describe Louisiana Board of Pharmacy laws and regulations pertaining to pharmacy internship
- Determine which learning experiences you can provide to the learner
- Describe how to assess learning needs and level of professional development
- Describe steps involved in negotiating goals and expectations with the learner
- Incorporate teaching into a busy practice environment

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## Goals

- Recognize the characteristics of highly effective teachers
- Explain the importance of orienting the learner to the practice site
- Explain the importance of providing timely evaluation and feedback to the learner
- Describe strategies to prevent potential problems and deal more effectively when problems occur

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## Overview

- The Law
- Learning objectives for pharmacy interns
- Self-Assessment
- Determining the learning needs of the learner
- Plan specific learning activities
- Implement the learning plan
- Evaluation and feedback
- The problem situation- prevention and treatment

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## Internship - Rationale

### Title 46 Chapter 7

- Obtain practical experience in the practice of pharmacy
  - ◆ concurrent with attending an approved college of pharmacy or
  - ◆ after graduation from an approved college of pharmacy.
- Experience shall be predominately related to the
  - ◆ provision of pharmacy primary care
  - ◆ dispensing of drugs and medical supplies,
  - ◆ the compounding of prescriptions,
  - ◆ keeping of records and making of reports as required under state and federal law.
- Under the direct and immediate supervision of a certified pharmacist preceptor.

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## Requirements of Intern

- **All students and graduates shall be registered with the Board**
  - ◆ Application must be submitted to the Board no later than the end of the 1st semester of the first professional year
  - ◆ Expires 1 year after graduation
  - ◆ Post conspicuously at preceptor site
  - ◆ Board may refuse to issue or recall any Intern Registration/ Work Permit

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## Requirements of Intern

- Appropriate attire
- ID with name and intern status
- Notify board in 10 days
  - ◆ Change of address
  - ◆ Change in location of employment
- Non-impaired
  - ◆ Confidential random drug screen

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## Hour Credits for Pharmacy Experience

- No hours with a pharmacist or pharmacy on probation
- 1500 hours required
  - ◆ 1500 hours prior to graduation
    - ◆ 500 hours prior to beginning of final academic year
    - ◆ 1000 hours of professional experience curriculum
  - ◆ 1500 hours after graduation
- Maximum credit of 50 hours a week
- A separate affidavit from each preceptor site
- Hours expire when intern registration expires



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## Preceptor Qualifications and Requirements

- Applicant shall be currently licensed and actively practicing for not less than 2 years prior to date of application
- The applicant shall not be on probation at the time of application
- The applicant shall complete a Board approved preceptor training program
- Applicant shall complete an application for Pharmacy Preceptor Certificate

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## Pharmacy Preceptor Certificates

- The Pharmacy Preceptor Certificate shall expire five years from the date of issue
- The Board shall reserve the right to refuse to issue or recall any Pharmacy Preceptor Certificate
- The Pharmacy Preceptor Certificate shall be prominently displayed

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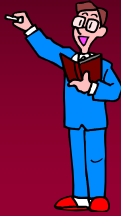
## Websites and Resources of Interest

[www.labp.com](http://www.labp.com)- Louisiana rules and regulations concerning pharmacy practice provided by the La. State Board of Pharmacy  
[www.nabp.net](http://www.nabp.net)- National Association of Boards of Pharmacy

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## Learning Objectives for Pharmacy Interns

- General abilities
- Dispensing Skills
- Clinical Skills
- Communication Skills
- Management Skills
- Reimbursement Issues
- Legal Issues
- Non-professional Activities



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## General Abilities

- Think critically, solve complex problems, and make informed, rational, responsible and ethical decisions
- Self assess learning needs , implement and evaluate strategies to promote continued professional competence
- Exhibit reliability and credibility in dealing with others

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## Dispensing Skills

- Receive a prescription and obtain and clarify all necessary information
- Evaluates drug orders for accuracy and safety
- Determines appropriateness of order based on diagnosis and patient history
- Evaluate and select correct drug product, including drug entity, manufacturer, dose and form
- Accurately prepares prescriptions for dispensing

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## Clinical Skills

- Appropriately identifies real and potential drug therapy problems
- Demonstrates a working knowledge of drug classes, MOA, common ADR's, and monitoring parameters
- Accurately collects drug and patient information
- Documents in the patients medical record to facilitate communication and collaboration among providers

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## Communication Skills

- Demonstrates a professional image and positive attitude through behavior, language and appearance
- Appropriately communicates orally and in writing with other health care professionals
- Effectively counsels patients regarding purpose, uses and effects of their prescription and OTC medications
- Accurately responds to information request from patients and other health care providers

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## Management Skills

- Identifies factors necessary to maintain pharmacy operations and/or quality of care provided
- Actively involved in controlling drug inventory and providing drug security, storage, and control procedures
- Appropriately dispose of outdated, discontinued or recalled drugs, and controlled substances
- Familiar with various ordering procedures (direct, wholesaler, drop shipping, etc)

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## Reimbursement Issues

- Properly processes prescription orders with third party payers (Medicaid, PCS, PAID, etc)
- Understands requirements for reimbursement of clinical services (Anticoagulation, Diabetes, etc)

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## Legal Issues

- Demonstrates a working knowledge of state and federal laws pertaining to pharmacy practice
  - ◆ Dispensing scheduled drug
  - ◆ State and federal laws concerning prescription files, prescription drug inventory, employee files, etc
  - ◆ Record keeping for scheduled drugs, poisons, etc

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## Non-Professional Activities

- Only a small percentage of the learners time should involve these activities. They should not be the sole responsibility of the learner.
  - ◆ Putting up stock
  - ◆ Running cash register
  - ◆ Cleaning pharmacy

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And how do we accomplish these objectives?

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## Step 1- Self Assessment

- Preceptor should first understand the dimensions, responsibilities and tasks of training a pharmacy intern.
  - ◆ *Review the "Professional Experience Objectives" which must be mastered.*
- Evaluate yourself and practice to identify the tasks performed in your pharmacy that will benefit the learner.

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Think about your experience as a student. What characteristics of the preceptors/teachers made learning effective and enjoyable for you?



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## Highly Effective Teachers

- Characteristics:
  - ◆ Organization and clarity
  - ◆ Knowledge
  - ◆ Enthusiasm- motivates learner
  - ◆ Instructor-student interaction
  - ◆ Clinical Supervision
  - ◆ Modeling professional characteristics

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## Highly Effective Teachers

- Students rate preceptors positively if they exhibit certain characteristics.
- Students learn more from preceptors who exhibit these characteristics.

*Good preceptors DO NOT have to be exactly alike but they SHOULD exhibit similar characteristics in similar situations!*

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## Self Assessment Exercise

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What characteristics of the learning environment made learning effective and efficient for you?



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## Learning Environment

- Characteristics of a productive learning environment
  - ◆ Enthusiastic and competent preceptor
  - ◆ Faculty and learner working together over time
  - ◆ Identified learning outcomes
  - ◆ Adequate mix of appropriate patients
  - ◆ Supportive team environment
  - ◆ Supplemental learning resources
  - ◆ Adequate time for teaching

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## Learning Environment

- Professional experience environment most complex teaching environment
  - ◆ Two sets of needs: Health care needs of patients and learning needs of intern
  - ◆ Sometimes there's a match between patients' health care needs and intern's learning needs but sometimes not

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## Step 2 - Determining Learning Needs of the Intern

- Review "Professional Experience Objectives" with the learner to determine learning needs
- Assess the learner's previous work experience and educational level
- Create a comfortable environment for the learner to talk about his or her capabilities and needs
- Be sure the learner understands the purposes of needs assessment

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## Step 2 - Determining Learning Needs of the Intern

- Ask the learner to estimate where he or she is in relation to achieving the capabilities it is expected he or she will acquire
- Let the learner know a perfect performance is not expected
- Help the learner think through his or her preferred ways of learning
- Explain that the initial assessment is the first part of a continuous process of assessment that will be integral to the learning experience.

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## Step 2 - Determining Learning Needs of the Intern

- Devise systems for the learner to record other learning needs that become apparent as the preceptorship experience proceeds
- Use initial needs assessment information in formulating goals and developing expectations with the learner



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## Why Set Expectations?

- To save time and energy by preventing mistakes
- To tailor the learning experience to different learners' particular needs
- To provide a framework for giving feedback and evaluating learner

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## Goals and Expectations

- Now that learning needs have been assessed you can discuss both the learner's and your goals and expectations in the following areas:
  - ◆ Acquiring knowledge
  - ◆ Developing technical skills
  - ◆ Refining values and attitudes
- Identify any constraints posed by factors associated with the preceptorship site, and revise goals and expectations accordingly

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## Goals and Expectations

- Commit collaborative goals and expectations to paper
  - ◆ Initial review
  - ◆ Clarify questions and concerns
  - ◆ Reminder to you and the learner
  - ◆ Share goals with staff
  - ◆ Learner takes ownership of the goals and works to meet them
- Periodically review the appropriateness of the goals and the learner's progress toward meeting them, and revise goals as necessary



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## Setting Expectations Exercise

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## Step 3 - Plan Specific Learning Activities

- Plan activities that will help the learner meet the “Professional Experience Objectives” and others determined by learner and preceptor
- Activities that lead to mastery of tasks and practice responsibilities
  - ◆ Daily practice responsibilities
    - ◆ Receive a prescription, determine correctness of prescription, prepare prescription label, etc.
  - ◆ Observation of selected tasks
    - ◆ Order Schedule II drugs, pharmacist/patient interactions, etc

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## Step 3 - Plan Specific Learning Activities

- ◆ Special Assignment and Projects
  - ◆ Journal club, nursing home visits, community projects, case presentations
- ◆ Reading
  - ◆ Independent learning modules, assigned journal topics
- ◆ Discussions with other interns, technicians and pharmacists
  - ◆ End of the day summary, Case of the week

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## Step 4 – Implement the Learning Plan

- ◆ The challenge- and reward- of precepting is in integrating teaching and patient care in synergistic ways to enhance each task and keep workload manageable.
- ◆ For this reason, a planned orientation to the preceptorship is essential
- ◆ Without a clear orientation process, it can take as long as two weeks for learners to figure out how to pace themselves, focus their encounters, set priorities, document their work , etc



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## Orientation to facility

- ◆ Orient learner to the facility and present ground rules; explain levels of authority and decision making
- ◆ Explain underlying philosophy or mission of the practice
- ◆ Tour the facility to learn the location of services, materials, and resources
- ◆ Explain rules or procedures that govern the employees (dress code, parking, office hours, phone system use, etc)

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## Orientation to facility

- ◆ Present a description of the patient population and community served
  - ◆ Types of care and services people seek
  - ◆ Typical age and background
  - ◆ Their views of health and illness
  - ◆ Their expectations of health care providers

***Provide a written summary of these rules***

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## Orientation to the learning experience

- ◆ Create a sense of excitement. In demonstrating your enthusiasm about your field, focus on areas of general interest, not topics beyond the learner's capacities.
- ◆ Present the big picture, i.e., the broad, overall goals of the preceptorship. Be careful not to overwhelm the learner with details.
- ◆ Point out the relevance of the preceptorship to career goals. Determine career goals and relate goals of the preceptorship to them.



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## Orientation to the learning experience

- ◆ Help learner understand *his* or *her* role and responsibilities in your practice. Your expectations should be congruent with the expectations of the Coordinator of Advanced Practice if rotation student.
- ◆ Help learner understand *your* role and responsibilities as a clinician/teacher. **Review evaluation forms with the learner to clarify how evaluations will be conducted.**

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## Orientation to the learning experience

- ◆ Let the learner know when you are free to work with him or her and how you plan to have the learner work with you.
- ◆ Provide specific information about the timing and structure of the work you plan to do with the learner.
- ◆ Tell the learner how to get in touch with you in an emergency



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## Orientation Exercise



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## Scheduling Learner's Time

- ◆ In a busy setting it's sometimes difficult to find time or energy to do much formal teaching.
- ◆ TIPS to optimize formal teaching:
  - ◆ In responding to a case presentation, briefly highlight one or two things and get back to other aspects later
  - ◆ Jot a note to help you keep track of teaching points to make or feedback which you need to share with the learner

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## Scheduling Learner's Time

- ◆ Encourage learner to keep a notebook to record questions and issues to discuss at later times
- ◆ Have learner review a topic
  - Topic can be based on an issue identified that day
  - New drug, new study receiving press attention
- ◆ Set a specific time limit and format for the presentation

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## Scheduling Learner's Time

- ◆ For your five or ten most common teaching topics
  - ◆ collect readings
  - ◆ dictate your talk
  - ◆ teaching scripts
- ◆ Encouraging your learner to seek knowledge from other sources as well promotes active learning

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## Finding Time To Review

- ◆ Spend a few minutes at the end of the day or half-day reviewing the day's activities - opportunity to review or solidify teaching points
- ◆ Discussion of the morning activities over lunch serve dual purpose
- ◆ Slow periods



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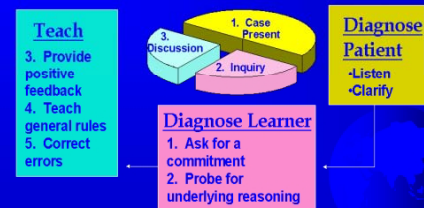
## One-Minute Preceptor

*(Microskills Based Teaching)*

- ◆ “Microskills” of clinical teaching allow preceptors to teach effectively in short periods of time
- ◆ First two microskills address *diagnosing* what the learner knows and understands
- ◆ Last three microskills focus on *teaching* the learner

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## One Minute Preceptor



Naber, 1992.

Department of Medicine, RWJMS

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## Microskill 1 Get A Commitment

- ◆ **WHY?...** Encourages learner to process further and problem solve
- ◆ Learners typically wait for preceptor's advice or guidance. Instead, ask learner to state what he or she thinks about the issue presented.
  - ◆ What do you think is going on with the patient?
  - ◆ What do you think is wrong with that prescription?

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## Microskill 2 Probe For Supporting Evidence

- ◆ **WHY?...** Helps you to assess learners knowledge and thinking process
- ◆ Help the learner reflect on commitment and present evidence to support position.
- ◆ Typically the learner will look to preceptor for confirmation.
- ◆ Instead, it is time to ask questions.
  - ◆ What findings led to your conclusion?
  - ◆ What factors did you consider in choosing this plan of action?

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## Microskill 3 Teach General Rules

- ◆ **WHY?...** Teaching point should be phrased as a general rule
- ◆ Helps learner remember and generalize instruction to subsequent situations.
- ◆ Through effective questioning, the preceptor can determine what learner needs to know to deal with the case more fully.
  - ◆ When this happens, do this....
  - ◆ When you see these characteristics, this is what your seeing....

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## Microskill 4 Reinforce What Was Right

- ◆ **Why?...** Behaviors that are reinforced will be more firmly established
- ◆ When learner has handled a situation effectively, take the first available opportunity to comment very specifically on
  1. What it was that he or she did well
  2. What effect it had
  - ◆ You did an excellent job of.... It made quite a difference in putting Ms. Smith's mind at ease

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## Microskill 5 Correct Mistakes

- ◆ **WHY?...** Mistakes that go uncorrected are often repeated so it's important to point out mistakes as soon after they occur as possible.
- ◆ Ask the learner to critique his/her own performance. If learner doesn't recognize a mistake was made, the preceptor needs to describe problem and how to correct.
  - ◆ Next time this happens, try this...
  - ◆ I agree that what you've said is probably true, but we still need to do this, for these reasons...

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## One Minute Preceptor Exercise

Dr. Daniel S. Miralbo  
633 Chatham Street, Fort Valley, GA 31030  
(912) 555-1212

Name A. Beckmanczyk Date 11/10/03  
Address \_\_\_\_\_ Age \_\_\_\_\_

Tylenol #3  
1-2 q 4-6 h prn pain  
# 100

Refills per

Dispense as written \_\_\_\_\_ Daniel Miralbo  
Substitution permitted

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## Effective Questioning

- Telling learner something vs. asking good questions
- Should be dominant activity of experiential learning
- Helps determine learning needs, stimulate thinking, transfer responsibility of learning to learner, and model essential professional behavior

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## Effective Questioning

- Ask one question at a time, a barrage of questions is confusing
- Allow sufficient "wait time"
- Wait **at least three seconds**:
  - ◆ After asking a question
  - ◆ After student stops speaking
- Model the kinds of questions you want learners to ask themselves by asking out loud the question you pose to yourself as you care for your patients

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## Types of Questions

- Questions can be addressed as follows:
  - (1) Addressing either **lower-level** or **higher-level** cognitive tasks
  - (2) As **cognitive** or **affective** in nature
  - (3) As **opened** or **closed**

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## Types of Questions

- **Lower-level**- asks for recall of facts, concepts, principles; useful to assess learners knowledge of basic facts but often overused

### For Example:

- What is the recommended storage for this reconstituted antibiotic?
- What is this medication used for?
- What are the side effects of this medication?

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## Types of Questions

- **Higher-level**- ask learner to analyze, synthesize, or evaluate information and to form judgments

### For Example:

- What would you recommend with regard to storage of this reconstituted antibiotic for this 4 year old?
- Tell me what you know about this medication.
- How would you counsel a patient on this medication?

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## Types of Questions

- **Cognitive** (factual) vs **affective** (emotional)
- Affective issues help learners identify their own attitudes and feelings and conveys the preceptor's attitude that affective issues are important in pharmacy practice

### For Example:

- ◆ How did you react when this patient became sad and tearful?
- ◆ How did that patient's attitude affect you?
- ◆ What did you do to make that patient feel more or less at ease (or welcome)?

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## Types of Questions

- **Closed questions**- narrow in scope, have one correct answer, and often elicit short, concrete responses

### For Example:

- ◆ Recall facts- What is the relationship between... and...?
- ◆ Prioritize- What is the most important issue to remember when filling Schedule II prescriptions?

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## Types of Questions

- **Open questions**-allow a range of possible answers, invite reflection and speculation, and stimulate problem solving

- ◆ Diagnose- What is your interpretation of the data?
- ◆ Decide- How do you think we should handle this situation?
- ◆ Hypothesize- What would you do if prescription didn't have a strength?
- ◆ Challenge- What leads you to that conclusion?

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## Types of Questions

### ■ AVOID

- ◆ **Leading questions**- You understand why this drug is inappropriate, don't you?
- ◆ **Assertions that masquerade as questions**- This is obviously migraine, wouldn't you agree?
- ◆ **Questions that humiliate**- Haven't most students learned about taking patient histories long before they reach this stage of training?

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## Teaching Scripts

- Way to organize knowledge about certain teaching topics
- Keep teaching points at your fingertips
- Must have a mental representation of the scripts for cases you teach regularly or have advance notice of the cases you'll be teaching

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## Teaching Script

<b>Goal:</b>	Correctly reorder medication
<b>Teaching Points:</b>	Wholesaler Ordering process Patient medication usage
<b>Teaching Strategy:</b>	Demonstration
<b>Common Learner Problems:</b>	Reorders medication without checking patient usage

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## Teaching Script

<b>Goal:</b>	Appropriately counsel patient on Amoxil Suspension
<b>Teaching Points:</b>	Take until completely gone Refrigerate Shake well
<b>Teaching Strategy:</b>	Mini-lecture
<b>Common Learner Problems:</b>	Doesn't instruct patient to finish medication

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## Feedback and Evaluation

	<u>Feedback</u>	vs.	<u>Evaluation</u>
<b>Timing</b>	Timely		Scheduled
<b>Setting</b>	Informal		Formal
<b>Basis</b>	Observation		Observation
<b>Content</b>	Objective		Objective
<b>Scope</b>	Specific Action		Global Performance
<b>Purpose</b>	Improvement		"Grading"

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## Why is Feedback Important?

- Learners who get feedback:
  - ◆ do significantly better
  - ◆ develop better judgment
  - ◆ learn faster
- Learners rate feedback as second most important quality of a good preceptor
- Most learners want more feedback on their clinical skills
- Feedback helps everyone

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## Barriers to Giving Feedback

- “The learners already know how they are doing.”
- “I don’t have time.”
- “That must have been an anomaly.”
- “I’m not used to this. I feel awkward.”
- “Learners get defensive.”

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## The “IMPROVE” Strategy

- I** - Identify Objectives with Learner
- M**- Make feedback-friendly environment
- P** - Assess Performance
  - Prioritize feedback
- R** - React to learner’s self-assessment
- O** - Objectively describe behavior, outcomes
- V** - Validate/ suggest alternatives
- E** - Establish a plan

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## Feedback in the Busy Practice

### Time:

- Brief feedback points during the day
- Set aside time for daily debriefings
- Mid-rotation evaluation

### Location:

- In your office or private setting (protect privacy)

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## Evaluation- Why is it important?

- An obligation of the role of teacher
- Professional responsibility
- Teaching/Learning opportunity

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## What Can Go Wrong



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## Evaluation Pitfalls

- “You never told me that!”
- “But I NEED Honors!”
- “Uh-Oh” - Should they pass?
- “Oops” – Insufficient Evidence

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## The “GRADE” Strategy

### Making it Work

- G** – Get Ready
- R** – Review Expectations with Learner
- A** – Assess: Observe and Record
- D** – Discuss Evaluation at Mid-Point
- E** – End with a “Grade”

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## Difficult Learning Situation

- The Truth...
  - ◆ Most of the time things go fine...
  - ◆ Occasionally...they don't.
  - ◆ An ounce of prevention...

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## Primary Prevention

(Prevent Problem before it occurs)

- Know the course expectations
- Orient the learner well
- Set clear expectations and goals
- Determine the learners goals and expectations
- Reassess and provide feedback regularly

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## Secondary Prevention

(Early detection of problem)

- Similar to medicine... Detect problem at an early and more easily managed stage
- Pay attention to your hunches/clues
- Don't wait
- Give specific feedback early and watch response
- Initiate SOAP early

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## Tertiary Prevention

(Manage problem to minimize impact)

- If it ain't workin'...SEEK HELP.
- Don't be a martyr
- Do not give a passing grade to a learner who has not earned it

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## “SOAP” Approach to Problems

- Subjective
  - ◆ What do you/others think and say?
- Objective
  - ◆ What are the specific behaviors that are observed?
- Assessment
  - ◆ Your diagnosis; *cognitive, medical, valuative, etc*
- Plan
  - ◆ Gather more data? Intervene? Get Help?

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Education in the professional practice environment is crucial to a student's professional development. Preceptors are able to demonstrate the practical implementation of the information mastered in the didactic portion of the student's education. They help make the transformation from student to independent practitioner.

**THANK YOU FOR YOUR COMMITMENT TO  
PHARMACY EDUCATION!!!**