

Pharm 428: Preceptor Quick Reference Guide

Fall 2020 - Winter 2021

This guide is to provide you with links and quick information that will be helpful when precepting your Pharm 428 student. As always, but this time seems special, we appreciate your involvement with our learners. AHS/Covenant Health Preceptors, can also access “The Preceptor Preparation Flow Map” available on the AHS Pharmacy Clinical Practice, Preceptor Support, Sharepoint page;

<https://share.ahsnet.ca/teams/PSPP/PCP/PreceptorSupport/Mentorship%20Documents/Forms/AllItems.aspx>

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CONTACT INFORMATION

Course Coordinator: Ann Thompson

Phone: 780.492.5905 Email: athompson@ualberta.ca

General Inquiries/CORE ELMS assistance: Anjela dela Cruz

Phone: 780.492.3362 Email: phexed@ualberta.ca

Institutional (AHS and Covenant Health) Faculty Liaison: Michelle MacDonald

Phone: 403.561.6278 E-mail: michelle.macdonald@ahs.ca

QUICK LINKS

- [Pharm 428 \(2020-21\) Course Information; syllabus, modifiable calendar, preceptor podcast](#)
- [Undergraduate Experiential Education Program Policies and Procedures Manual](#)
- [Faculty Preceptor Webpage](#)

- [Models of Precepting](#), guiding principles for co-precepting or other models, such as peer-assisted learning (PAL) model.

UPDATES and REMINDERS

COVID -19 Update

The COVID 19 pandemic may have differing influences on hospitals and pharmacy practice in the next year. Because this course runs for an entire school year, it is difficult to predict what pharmacy practice will look like over the span of a year. Therefore, flexibility regarding the course activities undertaken to achieve the outcomes is acceptable and encouraged. The syllabus was modified to reflect this (see *Course Activities and Discussion Summary*). [Primary changes include:](#)

- [Required COVID-19 readings/website review for students](#); to keep them safe and practicing within guidelines during pandemic.
- Patient care activities may occur by telephone or virtually; as deemed appropriate by preceptor.
- Interprofessional collaboration activity: In-person collaboration not required. This activity may be modified to reflect current practice procedures regarding collaboration with other health care professionals at your site as deemed appropriate by preceptor(s); attending patient rounds or patient care conferences.
- Patient Care Presentation; depending on pandemic situation and availability of an appropriately sized room, this can be recorded by student (and shared with staff) or presented virtually to allow for appropriate physical distancing.
- Inservice Presentation; depending on pandemic situation and availability of an appropriately sized room, this can be recorded by student (and shared with staff) or presented virtually to allow for appropriate physical distancing. Alternatively, written materials can be developed and shared.

Seminar Course: Students will attend their seminar course on select weeks throughout each placement block. of placements. Students are responsible for advising their preceptor when they will be participating in these sessions during the work day (typically over lunch hour).

Lab Facilitation by Students: Students (in Edmonton only) may participate in one Skills Lab at the faculty across the placement. This provides them with an opportunity for teaching and providing feedback. If students sign up for a lab, they are to advise the preceptor which date they will be at the faculty.

Resources for Students on Placement

If you feel your student is experiencing difficulty, please contact the Faculty (phexed@ualberta.ca) or the course coordinator. Province wide student resources are outlined on our [Student Services Wellness Resources webpage](#). This includes access to province-wide resources.

Reminder: Instructions how to view a student requirement. Students post their Resume and Learning Plan on CORE ELMS as a “Student Requirement. - Login to CORE ELMS. Click on the drop-down menu to select your student. Scroll to “Student Requirement” Section. Click on the file button.

Student Requirements

Miscellaneous			
Requirements	Completed	Completed On	File
Alcohol and Drugs Policy and Procedure (AHS/Covenant)	Yes	11-05-19	FORM
Student Resume		04-05-19	FILE 1
Learning Plans			
Requirements	Completed	Completed On	File
Pharm 426 - Learning Plan		12-30-19	FILE 1
Pharm 428 - Learning Plan		02-27-20	FILE 1

PREPLACEMENT PLANNING CHECKLIST for PRECEPTORS

- Ensure you can log into CORE ELMS; if you have concerns contact phexed@ualberta.ca
- Review this Quick Reference Guide. More Course Information can be found [here](#); scroll down to Pharm 428, links to course syllabus, preceptor review podcast, modifiable calendar. Resources also available on [Sharepoint Preceptor Support Page](#)
- Watch the Preceptor Review [Podcast](#); scroll down to Pharm 428; Start to develop placement activity schedule; modifiable calendar on [Faculty Course Information Webpage](#).
- Coordinate orientation and activities with co-preceptor(s), team and other health care professionals.
- Review Student Information: posted on CORE ELMS as a requirement 1 month prior to start of placement. (see instructions above) Reply to student confirming review of their posting; include additional information such as pre-readings, parking, start time, appropriate dress, etc.
- Review Student Learning Plan: posted as a requirement on CORE ELMS 1 week prior to start of placement.

ORIENTATION CHECKLIST

<p>1. COVID -19 Precautions and Protocols</p> <ul style="list-style-type: none"> • Review the infection measures currently used at practice site (hand washing hygiene, PPE, etc.) • Review how to communicate with patients to mitigate risks. <p><i>NOTE: Prior to the placement; students are required to review information on hand washing hygiene, PPE and infection control measures</i></p>	<p style="text-align: center;">v</p> <p>___</p> <p>___</p>
<p>2. Professional Discussions</p> <ul style="list-style-type: none"> • Preceptor’s practice experience and interests. • Feedback and communication; including preceptors preferred method of contact. • Student/preceptor responsibilities and expectations; including preceptor review of assignments, provision of feedback and student’s submission of assignments or documentation for review. • Practice expectations; patient confidentiality, dress and appearance policies. • Pharmacy/facility information regarding policies and procedures, including patient and staff safety. • Information regarding professional and pharmacy activities. • Review Student’s Skills Inventory and Learning Plan. 	<p>___</p> <p>___</p> <p>___</p> <p>___</p> <p>___</p> <p>___</p> <p>___</p>
<p>3. Course Discussions; review course syllabus</p> <ul style="list-style-type: none"> • Activities & Assignments; patient care, presentations, in-services, projects, etc. • Assessment process; review forms (Student Performance Assessment in syllabus) and timing • Discuss student/preceptor responsibilities and expectations • Review preliminary student schedule 	<p>___</p> <p>___</p> <p>___</p> <p>___</p>
<p>4. Pharmacy Practice</p> <ul style="list-style-type: none"> • Practice specialties and characteristics • Site resources and learning opportunities • How will the student be involved in patient care • Provide samples of forms used, documentation policies and procedures 	<p>___</p> <p>___</p> <p>___</p> <p>___</p>
<p>5. Practice Environment</p> <ul style="list-style-type: none"> • Guided tour of practice environment; dispensary, offices • Introduction to staff; include roles and how they will be involved with student experience • Library, drug information and other resources • Student workspace • Staff cafeteria, coffee area, lockers, washrooms, etc. • Computers, order entry systems, phone, internet 	<p>___</p> <p>___</p> <p>___</p> <p>___</p> <p>___</p>

PLACEMENT POLICIES and PROCEDURES

The following are policies that preceptors often have questions about. Further information can be found in the [Policies and Procedures Manual](#). If unsure, preceptors are encouraged to contact the Faculty.

Students are required to record absences using the Absence Tracker in CORE ELMS. The preceptor will receive an email noting the absence and is required to confirm or deny the request through CORE ELMS.

- **Statutory Holidays:** If a stat holiday falls during a placement, it is at the discretion of the preceptor to determine how to proceed. Students may be granted the stat day off, a day off in lieu of the stat or include that day as a placement day.
- **Illness:** In the case of illness, students are expected to notify the preceptor as soon as possible and record their absence in the Absence Tracker. Time missed from the placement site due to illness that exceeds 1 day needs to be made up. Absences due to illness of 2 days or more will be assessed individually by the Faculty regarding if time needs to be made up.
 - If students experience Covid-19 like symptoms or have concerns due to a COVID -19 exposure, they should complete the AHS On-line Self-Assessment and follow instructions to be tested and/or self-isolate. If self-isolation is recommended, students are required to record their absence in the Absence Tracker.
- Routine medical appointments are expected to occur on personal time.
- **Bereavement:** In the case of death of a family member, students should notify their preceptor and the course coordinator to determine a course of action. Time missed from the placement site due to bereavement that exceeds 1 day needs to be made up.
- **Faculty Endorsed Activities:** The Faculty supports student participation in activities such as the career fair, educational interviews, conferences and PDW if feasible with the placement schedule, if preceptor approval is confirmed prior to the activity and the time away from the placement is reasonable. Time missed from the placement for approved professional development activities that exceeds 1 day needs to be made up.

The preceptor may deny a request for professional development if patient care or the practice site is negatively affected by the student's absence or it's anticipated that the time missed will impact the student's ability to complete the placement successfully.
- **Non-Endorsed Activities:** Activities ineligible for absence approval include; mock OSCE's, job interviews, jurisprudence exams, travel and vacation. Changes to course dates to accommodate personal holidays are not permitted.
- **Placement Timeframe:** modification to the placement schedule outside of the stated course timelines must be approved by the course coordinator in advance of the change.
- **Needle Stick Injury Procedures:** If a student experiences a needle stick injury, they must report the incident immediately to the preceptor and follow the placement site protocol. The Faculty must be advised immediately. There is further information in the [Policies and Procedures Manual](#)

ASSESSMENT INSTRUCTIONS and INFORMATION

- All assessments are completed and submitted using CORE ELMS. (*See evaluation tab on left side of screen.*) Assessments can be viewed in CORE ELMS prior to the start of the placement.
- The Faculty reviews all assessments at midpoint and final for completion and content.
- Instructions including grading criteria are stated at the beginning of the Student Performance Assessment. [Click here](#) to view grading criteria and a summary of all assessments/evaluations to be completed and discussed by preceptor and student.
- Periodically click on "save" tab at bottom of form to avoid a "time-out" and losing information. Assessments can be saved as a draft and completed later; remember to "save" before exiting or information will be lost.
- Once the completed assessment is submitted, it is visible to the student being assessed.
- All assessments must be discussed; acknowledgment indicates the assessment has been discussed.

- Comment boxes should be used to provide evidence to support the grade given and It is especially important to provide details when the student is struggling or not meeting expectations.
- If you have difficulties accessing or submitting assessments, contact: phexed@ualberta.ca.
- Assessment information including a FAQ document and 14 min podcast available [here](#).

LEARNING PLAN

The Learning Plan helps students prepare for the placement, assess their learning and develop self-directed learning skills. **Preceptor feedback is important** to ensure the student's learning goals are appropriate for the placement site. The following timelines describe this activity:

- At least 1 week prior to the start of the placement; students post the Skills Inventory and Learning Plan in CORE as a requirement. This allows time for preceptor review.
- During the first few days of the placement the Learning Plan should be discussed. If changes are made the student reposts the revised Learning Plan. If no changes were made no additional posting is required.
- Midpoint: Students discuss the progress achieved with the preceptor. Areas indicated by the preceptor as "Needs Improvement" on the midpoint Student Performance Assessment should be added by the student to their midpoint Learning Plan as learning goals to track progress.
- Final: Students discuss their progress at end of the placement and post the updated Learning Plan.

COURSE ACTIVITY and PRECEPTOR DISCUSSION SUMMARY

Preceptor supervision is important, especially early in the placement, with graduated independence for various activities such as gathering a medication history, patient education, as competence is demonstrated.

[Click here](#) to view Summary tables of Course Activities and Preceptor Discussions.

ASSIGNMENT SUMMARY

Students have been advised to submit assignments to preceptors in a timely basis to allow time for review and to provide feedback prior to posting. It is suggested that preceptors advise students of their timelines and expectations.

[Click here](#) to view a Summary of Course Assignments

PATIENT CARE PRESENTATION: CONTENT and RUBRIC

Pending pandemic situation and availability of an appropriately sized room, this can be recorded by student (and shared with staff) or presented virtually to allow for appropriate physical distancing.

Goals of this activity are to allow students:

- To share patient care experiences and understanding of clinical issues.
- To provide a verbal presentation of their patient, DRP(s) and recommendation in a systematic manner (this has been practiced in the skills lab). **This can be done virtually using on-line technology.**
- Practice presentation skills (use the PowerPoint slides is optional, the format should be discussed with the preceptor)
- Provide evidence-based review of literature to support their recommendations(s) (this has been practiced in the skills lab using the BEARs format as a way to keep evidence review brief.)

- The presentation should be approximately 20 mins in duration, with up to 5 minutes for questions.
- It is suggested that a patient case be chosen in which interaction with the patient helped the student to assess the patient's DRPs and where their intervention affected or potentially will affect outcomes.
- **Students and preceptors should discuss the patient care plan they want to present by the midpoint of the placement. Students should provide the preceptor with a first draft soon thereafter to allow time for preceptor review. Students should then revise the presentation based on the feedback given.**

Suggested Patient Care Presentation Content (*Adapted from FMC Clinical Presentation Guidelines and Rural Journal Club Case Presentation Format*)

[Click here to access outline/content](#)

Patient Care Presentation Rubric (*Adapted from PharmD Experiential Learning Presentation Rubric and FMC Clinical Presentation Guidelines*)

- To be used by the preceptor & other observers.
- Rubric is in the syllabus.
- Student to bring copies to the presentation.

[Click here to access rubric](#)

PHARMACY CARE PLAN WORKSHEET with CHECKLIST for STUDENTS and PRCEPTORS

Preceptors and students can use this worksheet to ensure the student's care plan is complete.

[Click here](#) to access the worksheet.

ON-CAMPUS CURRICULUM OVERVIEW: BScPharm and PharmD for BScPharm Students (PBS)

[Click here](#) view the courses, therapeutic modules and practice skills students have taken

CLINICAL EXPECTATIONS for CARE PROVIDER ROLE for PBS PharmD STUDENTS Across Y4 EXPERIENTIAL COURSES: Guidance for Preceptors and Students

During 4th year, students in PBS program complete three 8-week clinical experiences and one 8-week specialty elective/professional practice experience that may or may not be in a patient care setting. The order these are completed will vary for each student. This table is to guide expectations from initial to final placement for the Care Provider role. Students are expected to improve across their final year placements and:

- Integrate/apply their knowledge using a systematic patient care process
- Increase proficiency, clinical judgment, confidence, and complexity of care by the final placement.

GUIDING PRINCIPLES:	
<p>1. As each placement progresses and similar patient scenarios are encountered, students are expected to incorporate knowledge/skills and provide care with more confidence. Initially, complex patients may require more preceptor support.</p> <p>2. By the end of APPE 3/4, students should demonstrate competence to apply foundational knowledge and skills to effectively manage patients with common medication therapy problems.</p> <p>3. Students are expected to embody and demonstrate the attitude and behaviours of a pharmacist and integrate required skills to enable them to achieve the expectations of their care provider role (such as effective communication, demonstrating professionalism, etc).</p> <p>4. Students are expected to identify areas for development across placements and incorporate this into their Learning Plans. They should come prepared and ready to learn (i.e. read recommended materials, show initiative).</p>	
APPE (Advanced Pharmacy Practice Experience) 1 & 2	APPE (Advanced Pharmacy Practice Experience) 3 &/or 4
<p>For assigned patients, students should:</p> <ul style="list-style-type: none"> ● Gather data completely and accurately. ● Identify and prioritize DRPs/patient needs; <i>may need support with prioritization.</i> ● Recognize and integrate relevant patient-specific factors into pharmacotherapy work-up and care planning; <i>support may be required, especially in weeks 1-4 of each placement.</i> ● Develop an acceptable care plan; emphasis on process. ● Justify recommendations/decisions; <i>clinical judgment will require support, especially initially, but should improve with experience;</i> <ul style="list-style-type: none"> ○ Consult literature/references to support rationale. ● Implement care plan and undertake appropriate actions; <ul style="list-style-type: none"> ○ Includes adapting, initiating, renewing/continuing, discontinuing, referral, etc. ● Provide accurate and appropriate patient education for common conditions; <i>may need support tailoring and/or researching information for less common conditions/medications.</i> ● Document using DAP or consult format; <i>may require coaching to ensure consistent with the practice; adapts appropriately to practice setting.</i> <ul style="list-style-type: none"> ● Fulfill commitment for follow-up as appropriate. ● Present patients verbally in acceptable manner; <i>may need coaching with format and content; confidence builds over placement.</i> ● Increase knowledge of disease states relevant to practice setting, and develop confidence applying knowledge. 	<p>Building upon the skills practiced in APPE 1 and 2, students should:</p> <ul style="list-style-type: none"> ● Increase confidence and proficiency with patient care. ● Identify and prioritize commonly encountered DRPs. ● Prioritize patient needs appropriately. ● Integrate patient specific factors into decision-making; <i>with minimal prompting.</i> ● Develop acceptable care plans: emphasis on quality and appropriateness of patient care recommendations. ● Defend recommendations with confidence. ● Demonstrate ability to make prescribing decisions, when appropriate. ● Provide accurate and complete patient education, identifying when additional information is required and proactively seeking this. ● Document information in appropriate manner, <i>with minimal assistance.</i> ● Complete verbal patient presentations concisely and confidently. ● Readily identify knowledge gaps and seek to find answers, and review with preceptor to verify understanding.

ACTIVITY, ASSIGNMENT and ASSESSMENT SCHEDULE

Week	Student Activities
1-4 weeks before placement starts <i>(see Preplacement Planning Checklist; page 3)</i>	___ Review course information, activities, and assignments; Click here to access ___ Advised student of pre-readings, start time, initial schedule, etc. ___ Start to develop placement schedule; use Modifiable Calendar; Click here to access ___ Review student resume on CORE (4 weeks prior) & Skill Inventory/ Learning Plan (1 week prior)
Daily throughout the placement	___ Provision of Patient Care, review documentation with preceptor. • Prepare care plans and document care provided according to practice area. • Minimum: 20 patients across the placement (provide care for a minimum of 4 patients concurrently by week 3). ___ Conduct Medication Reconciliations. ___ Retrieve drug information. ___ Collaborate with the pharmacy team as a student pharmacist. ___ Ensure activities, discussions, assignments are completed; student is responsible for ensuring completion of all course requirements.
Week 1: Orientation, Create Placement Schedule Date: _____	
Orientation <i>(see Orientation Checklist; page 3)</i>	___ Review pandemic policies and procedures in place for staff and patients. ___ Review initial Learning Plan, course objectives, activities including modifications due to pandemic. ___ Discuss student/preceptor expectations and responsibilities. ___ Discuss assessment processes and timelines (include informal feedback) ___ Develop and plan activity schedule; in-service, presentations, patient care. Activities including patient care may be modified due to pandemic policies. ___ Tour of pharmacy and institution; including patient care units. ___ Log in to ensure Netcare access as well as other on-site systems.
Daily Patient Care & Documentation Additional Activities to be incorporated and scheduled across the placement	___ Discuss pharmacy care plans and clinical documentation; format/ process for documenting in chart/computer profile. ___ Set up routine process for providing daily care for assigned patients: rounding, patient conferences, medication reconciliations, discharge counselling, etc. ___ Plan initial patient interaction based on review of patient's chart and other information sources (Netcare, other healthcare professionals). ___ Implement care for patients including documentation (reviewed by preceptor). ___ Schedule visits with Health Care Professional(s); Inter-professional Activity; see syllabus for suggested activity modifications if needed. ___ Discuss/schedule in-services(s) and presentation(s); see syllabus for suggested activity modifications if needed. ___ Observe/discuss or participate with the institution's distribution process. ___ Ensure discussions are scheduled: Professionalism; Maintaining Professional Competency, Scope of Practice, etc.
Week 2: Date _____ Week 3: Date _____	
Continue patient care activities and documentation	___ Develop and discuss at least one Clinical Judgement written summary with preceptor (total of 3 to be completed across placement) ___ Plan healthcare collaboration activities.

Week 4: Date _____	
Patient Care and other course requirements	<ul style="list-style-type: none"> ___ Continue care plans and corresponding documentation. ___ Select 2 patients to post care plans; review with preceptor prior to posting. ___ Review progress regarding other 2 Clinical Judgement written summaries with preceptor (if not yet completed). ___ Review progress regarding Patient Care Presentation and in-service; see suggested modifications in syllabus if needed.
4th Thursday of the placement eClass Posting Due: 9:00PM	<ul style="list-style-type: none"> ___ Post assignment on eClass; first 2 of 4 pharmacy care plan worksheets or site-specific forms and documentation as entered onto the patient's chart/profile. (typewritten, documentation can be screen shot; no patient identifiers) ___ Complete and submit midpoint Student Self-Assessment (CORE ELMS) by Wednesday to allow preceptor review prior to Student Performance Assessment.
Mid-Point (end of Week 4)	<ul style="list-style-type: none"> ___ MID-POINT Assessments: Student Performance Assessment-midpoint; completed by preceptor; review with student. ___ Student Evaluation of Preceptor and Site and Student Self-Assessment; discuss ___ Update Learning Plan with progress as well as grades of Needs Improvement from Student Performance Assessment and post the midpoint Learning Plan.
Week 5: Date _____ Week 6: Date _____	
	<ul style="list-style-type: none"> ___ Complete in-service and continue to develop patient care presentation. ___ Continue medication reconciliations, patient care plans and corresponding clinical documentation; review with preceptor. ___ Select 2 patients to post care plans and documentation. ___ Assess completion of discussions; professionalism, communication, medication distribution process and safety practices, scope of practice, etc.
6th Thursday; eClass Post 9:00 PM	<ul style="list-style-type: none"> ___ Post 2 additional care plan worksheets or site-specific documentation and clinical documentation. (Same as week 4 assignment)
Week 7: Date _____ Week 8: Date _____	
Assignment and Assignment Completion	<ul style="list-style-type: none"> ___ Review activity table to ensure all activities and discussions have been done. ___ Ensure Inter-Professional visit has been completed and debriefed. ___ Conduct Patient Care Presentation. ___ Ensure completion of discussions; advocacy, resources, etc.
Patient Care	<ul style="list-style-type: none"> ___ Ensure continuity of care documentation is entered into patient profile and conveyed to patient pharmacy team.
End of Week 8: Final Assessments (CORE ELMS)	<ul style="list-style-type: none"> ___ Final Student Performance Assessment and Placement Grade; review with student ___ FINAL Student Evaluation of Preceptor and FINAL Self-Assessment; discuss with preceptor. ___ Update and post the final Learning Plan in CORE ELMS. ___ Complete Anonymous Preceptor Course Survey (survey link emailed to preceptor)