



# UNIVERSITY OF ALBERTA

## Advanced Pharmacy Practice Experiences Preceptor Quick Reference Guide 2024-25

### 4th Year Placements Pharm 554

Pharm 554 (Community Pharmacy)

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This guide is designed to provide you with links and quick information that will be helpful when precepting your student in an Advanced Pharmacy Practice Experience (4th year) course.

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## Quick Links

- [Pharm 554/555/556/557 course information](#) (syllabus, modifiable calendar template, preceptor podcasts, preceptor quick reference guide)
- [Undergraduate Experiential Education Policy and Procedure Manual](#)
- AHS Resources (accessible for AHS employees):
  - o [Psychological Safety](#)
  - o [Diversity and Inclusion](#) and [Best Practice Guide: Microaggressions](#)

## Reminders

1. **Instructions on how to view the documents posted for student requirements.** 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

Requirements	Completed	Completed On	File	Expiration
<b>Miscellaneous</b>				
Alcohol and Drugs Policy and Procedure (AHS/Covenant)				
Student Resume			FILE 1	
<b>Learning Plans</b>				
Requirements	Completed	Completed On	File	Expiration
Pharm 554 Learning Plan (+ Skills Inventory)				
Pharm 555 Learning Plan (+ Skills Inventory)				
Pharm 556 Learning Plan (+ Skills Inventory)				
Pharm 557 Learning Plan			FILE 1	

2. **Student Schedule:** Please try to provide your student with their planned placement schedule and hours of work as early as possible, ideally before their rotation starts. This will help the student plan appropriately and avoid conflicts with rotation schedules.
3. **Lab Facilitation by Students:** Students may participate in one Patient Care 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 participating in this activity.

4. **Seminar Course:** The PharmD program requires students to be co-enrolled in a Seminar Course when they are in experiential courses. Students will be working in groups and are to select meeting times that will have no to minimal disruption to placement schedules. If students do plan to meet during placement time, it should only be with advanced planning and permission.

## Planning for the Placement

- Review the applicable course syllabus and this quick reference guide.
- Watch the course overview podcast(s) [here](#) (scroll down to the correct course number and click on the appropriate links).
- Utilize the modifiable calendar available on the website for customization and organization of schedule/activities. This is in Word for customized use.
- Review the on-campus courses the students have taken in years 1-3 ([Appendix 1](#)).
- ONE week before the placement starts, review the student's first draft of their Learning Plan (posted in CORE ELMS under Student Requirements, located on your dashboard once you select your student) and provide feedback about their goals during orientation.
- Review [Appendix 2](#) which outlines clinical expectations for students providing care as they progress through their placements.

## Placement Policies and Procedures

The following are policies that preceptors often have questions about. Further information regarding other policies can be found in the [Policy and Procedure Manual](#). Preceptors are encouraged to contact the Faculty if they are unsure. **In general, time away from each placement that exceeds one day needs to be made up.**

- *Absence Tracker:* Students are required to use the Absence Tracking feature in CORE ELMS. Students must record any absence in CORE ELMS and the preceptor will receive an email noting the absence and be required to confirm or deny the request on-line.
- *Statutory Holidays and Religious Observances:* Should a statutory holiday fall within the timeframe of the 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. Students may also request time off for religious observances. Students and preceptors should contact the Course Coordinator in advance to determine the most appropriate course of action. Students will be expected to make up time missed if more than 1 day is missed during the rotation.
- *Illness:* In the case of illness, students are expected to notify the preceptor as soon as possible. Absences due to illness of 2 days or more may require an explanation and/or evidence such as a physician's note. Either the student or preceptor should contact the Faculty if the absence exceeds 2 days. Routine medical appointments are expected to occur on personal time. **Time missed from the placement site due to illness that exceeds 1 day needs to be made up.**
- *Covid-Related Symptoms:* Follow site policies regarding policies attending work while symptomatic or ill.
- *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.
- *Faculty Endorsed Activities:* The Faculty supports student participation in activities such as lab facilitation (for one day per placement block), conferences and PDW if feasible with the placement schedule. Preceptors should be informed of these occurring, and the total time away from the placement should be reasonable. Time missed from the placement for approved professional developments activities that exceeds 1 day needs to be made up. The preceptor may speak to the course coordinator about an activity if they feel the standard of care to patients will be negatively affected by the absence of the student or it's anticipated that the time missed will impact the student's ability to complete the placement successfully. Some students may need to attend interviews for employment, residency programs, and admission to other programs. Any missed time will need to be made up if these activities occur on placement time. Where possible, students should schedule these during non-placement time.

- *Non-Endorsed Activities*: Activities ineligible for absence approval include: mock OSCE's, jurisprudence exams, travel and vacation. Changes to course dates to accommodate personal holidays are not permitted.
- *Placement Time Frame*: Modification to the placement schedule outside of the stated course timelines must be approved by the course coordinator in advance of the change.
- *Workplace Injuries (including Needle Stick Injuries)*: If a student experiences an injury while on rotation, 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](#).
- *Home Visits*: Students are NOT permitted to conduct patient home visits without the direct supervision of a preceptor.
- *Inappropriate Behaviours by Others*: Discuss with students what they should do if faced with a difficult, abusive, discriminatory patient, staff person, or other health care professional including microaggressions. Bring to the preceptor's attention for appropriate action, debrief together, report and document, as well as contact faculty. Discuss with students the possibility of having a "safety signal" so that the student can gesture to their preceptor if they need assistance. For preceptors at AHS, there are AHS resources noted in Quick Links (page 2).

## Resources for Students

Student Wellness is important. Students Services at the Faculty is readily available to support all students across their placements. If you feel your student is experiencing difficulty, please contact the Faculty ([phexed@ualberta.ca](mailto:phexed@ualberta.ca)) or the course coordinator.

## Assessment Procedures and Information

- All assessments are completed and submitted through CORE ELMS.
- After logging in, the evaluation tab is in the green column on the left side of the screen.
- To allow for preparation by preceptors, assessments can be viewed in CORE ELMS at least 1 week prior to the start of the placement. Instructions are outlined in the Student Performance Assessment. At the end of the placement, you will assign a placement grade of Pass or Fail. At midpoint, a pass / fail grade is not assigned.
- Based on ratings assigned at the midpoint assessment, if a student has 4 or more "Inconsistently Meeting Expectations" or any ratings of "Not or Rarely Meeting Expectations", the course coordinator will reach out to offer support to both the student and the preceptor(s).
  - One strategy to support learning and feedback is to conduct a "supplemental" assessment after 6 weeks. This is intended to provide more diagnostic feedback to help the student work towards achieving the learning outcomes. The decision on whether this is needed would be determined in collaboration between the student, preceptor(s) and Course Coordinator .
- The criteria for each outcome is in CORE ELMS (on-line) and is also in the [course syllabus](#).
- To support preceptors in best practice in assessment, the foundational preceptor skills online training includes a module on Student Performance Assessment (module 4), which can be accessed [HERE](#). This takes 30-40 minutes to review, and we recommend this for all new preceptors, and it is a good refresher for more experienced preceptors.
- If you have difficulties accessing or submitting assessments, contact: [phexed@ualberta.ca](mailto:phexed@ualberta.ca).

## Grading Criteria

In order for the preceptor to provide a recommendation of "PASS" for the placement, for the skills and behaviours associated with each outcome for this placement, the student must:

1. Achieve a rating of at least "**Mostly Consistent in Meeting Expectations**" on all professionalism outcomes and
2. Have no more than 3 (maximum of 2 for care provider) outcomes achieve a rating of "**Inconsistently Meeting Expectations**" and
3. Have zero ratings of "**Not or Rarely Meeting Expectations**"

If a preceptor is concerned that a student is at risk of failing or if they intend to fail the student, they must contact the course coordinator as soon as possible so that they can be present during the final assessment session to support both the preceptor and the student.

### Assessment Tips and Suggestions

- Periodically click on the “save” tab at the bottom of the form, to avoid a “time-out” and losing information entered.
- Assessments can be completed in ‘real time’ and saved as a draft to complete later; “save” before exiting or information will be lost.
- Once the completed assessment is submitted, it is visible to the student being assessed.
- Disregard the “section weight” and “minimum AVS score required” sections.
- All assessments must be discussed with the student. There is an acknowledgment at the end of each form that indicates the assessment has been discussed by the student and preceptor.
- Comment boxes should be used to provide evidence to support the grade given. While the rating score for each area of assessment is important, providing written commentary that supports your decision This is especially important when the student is not meeting expectations, or is inconsistently meeting expectations and requires improvement, as it provides specific details about concerns.
- Completion reminders are emailed by the Faculty.
- Faculty reviews all assessments at midpoint and final for completion and content.
- If you are co-precepting or using another precepting model such as peer-assisted learning, refer to the [Faculty Models of Precepting Webpage](#) for suggestions on completing assessments.

### Summary of Assessments / Evaluations to Be Discussed between Preceptor and Student

(All assessments are completed and submitted through CORE ELMS)


Assessment/ Evaluation	Submission Timeframe	Submitted by	Comments
Student Self-Assessments (SSA) (completed twice)	Midpoint and end of placement	Student	<ul style="list-style-type: none"> <li>• Midpoint should be submitted 2-days prior to the Midpoint Assessment discussions to allow time for preceptor review.</li> <li>• For Final SSA, students should complete and be prepared to discuss at final assessment.</li> </ul>
Student Performance Assessment MIDPOINT	End of week 4	<b>Preceptor</b>	<ul style="list-style-type: none"> <li>• It takes about 30-60 minutes to complete.</li> <li>• Includes identification and discussion of areas and skills that will be focussed on for balance of the placement.</li> </ul>
Student Evaluation of Preceptor and Site – MIDPOINT	End of week 4	Student	<ul style="list-style-type: none"> <li>• Students must discuss with preceptor after discussion of the Student Performance Assessment</li> </ul>
Student Performance Assessments – FINAL Recommend Final Placement Mark	End of placement	<b>Preceptor</b>	<ul style="list-style-type: none"> <li>• It takes about 30-60 minutes to complete.</li> <li>• Assessment of all learning outcomes. (same as midpoint)</li> <li>• At the end of the assessment preceptors provide a <u>Placement Mark: PASS or FAIL</u> based on the overall grades assigned to each learning outcome.</li> </ul>
Student Evaluation of Preceptor and Site – FINAL	End of week 8	Student	<ul style="list-style-type: none"> <li>• Students must discuss with preceptor after discussion of the Student Performance Assessment</li> </ul>
Preceptor Evaluation of Course	After student has left placement site	<b>Preceptor</b>	<ul style="list-style-type: none"> <li>• Anonymous – option provided to have Faculty contact the preceptor</li> </ul>

### Pharm 554 - Community Practice - Updates for 2024/2025

1. Minor changes have been made to the course outcomes to provide an increased emphasis on interprofessional collaboration, advocacy for individuals outside of the healthcare environment and to broaden the student’s demonstration of professional behaviours and attitudes.
2. No changes have been made to the course activities or assignments.

3. Continued request to have preceptors review organizational processes related to discrimination within the practice site with students (microaggressions and overt discrimination). To better prepare students for EDI-related practice issues, the Class of 2025 has been encouraged to listen to the ACP Spotify podcasts titled "Pharmacy Perspectives - Creating Saf(er) Spaces.
4. The assessment rating scale has been updated based on feedback received from preceptors. Information on the rating scale is outlined in CORE ELMS, and the grading criteria to make the pass/fail decision on the placement portion of the course has been updated with the new rating scale language.

**Pharm 554 - Community Practice - Course Activities Summary**

<p style="text-align: center;"><b>COURSE ACTIVITIES</b></p> <p style="text-align: center;"><b>The following are activities that students must complete during the placement to meet course objectives.</b></p>	
<p><b>Provide Patient Care</b></p> <p>During the placement, students will provide care to patients under the supervision of the preceptor(s). For all patient care encounters, students should provide patient care as deemed appropriate by the preceptor(s) and as outlined in the <a href="#">Patient Care Process</a>.</p> <p>All documentation of patient care activities must be written by the student and reviewed by the preceptor.</p> <ul style="list-style-type: none"> <li>● Interview the patient or agent and / or other relevant healthcare providers to obtain necessary information to obtain necessary information and organize the information to determine medication and health related needs.</li> <li>● Assess if the patient's medication and other health related needs are being met. (complete best possible medication history and / or review a medication reconciliation; review for indication, effectiveness, safety and adherence)</li> <li>● List and prioritize the patient's medical conditions and drug related problems.</li> <li>● Develop and implement a care plan that is based on best evidence and prioritizes and addresses the patient's drug therapy problems and wellness needs. Integrate assessment of patient readiness into the care plan (i.e. engage patients in shared decision-making, as appropriate).</li> <li>● Take appropriate actions as required (i.e. prescribe under pharmacist supervision, order appropriate labs under pharmacist supervision, etc).</li> <li>● Provide patient education (e.g. medication teaching, discharge counselling, etc.). Include education pertaining to patient self-management.</li> <li>● Assist in patients' self-care (e.g. use of diagnostics, point-of-care testing and self-monitoring) as required</li> <li>● Provide follow-up/continuity of care and modify care plans as needed; conduct follow-up (e.g. seamless care activities, modify plans as needed)</li> <li>● Communicate and document patient care activities <ul style="list-style-type: none"> <li>○ The Pharmacy Care Plan Worksheet (posted in eClass) can be used or site-specific patient care plan formats may be used. At the start of the placement, it is suggested that preceptors and students discuss which format</li> </ul> </li> </ul>	

is appropriate and comfortable for the student to use.

- Administration of Drugs by Injection: Students who successfully completed the training and also have completed CPR Level C + First Aid, should practice administering drugs by injection. Students must only administer injections under the direct supervision of a pharmacist authorized by ACP to administer drugs by injection. Some sites may not be providing injections.

Designated Patient Care Activities

- Dispensing related
  - Students assess patients and their drug therapy for indication, safety, adherence and efficacy and document care for a minimum of 4 patients each day.
  - Across the placement, students should develop proficiency assessing all prescriptions as part of a systematic patient care process (including documentation).
- Acute care (includes Self-care)
  - Students provide patient care for a minimum of 20 patients with acute conditions and / or self-care needs such as infection, pain, allergic reaction, heartburn, etc.
  - The assessment by the student should be discussed with the preceptor and then documented on the patient's profile.
- Chronic disease management (CDM)
  - Students provide patient care for a minimum of 20 patients with chronic conditions (minimum of 4 different chronic diseases). To gain a greater understanding of an illness, it is suggested that students care for more than 1 patient with the same / similar condition to allow for a greater understanding of how conditions present in different patients and also see various stages or severity of diseases. As the placement progresses, students should care for patients with co-morbidities and increasing complexity.

**Clinical Judgment: Review and Reflection**

- For 3 patients, students will write a summary of the factors considered (i.e. specific variables, evidence) to formulate one of the recommendations made. The written summary should include the clinical issue, the patient assessment (including questions asked), clinical data retrieved and considered to make a decision. The student should review each written summary with the preceptor and discuss their rationale for the decision made and the outcome.

**Medication Distribution**

- Students participate in all stages of the distribution process and apply the standards of practice, laws, and regulations governing pharmacy practice. Includes prescription intake, review, processing, checking (under preceptor supervision) and counselling.
- By the end of the placement students should be able to fill and check at least 25 sequential prescriptions without errors.
- Students are expected to demonstrate competency in each stage of the distribution



<p>process as well as with the laws and regulations associated with pharmacy practice.</p>	
<p><b>Drug Information Requests</b></p> <ul style="list-style-type: none"> <li>● Students will respond to questions in a timely manner using best evidence, including answers to self identified questions to care for patients.</li> <li>● Information may be required either verbally, written or both. (Drug Information Inquiry Record form is posted on eClass if a site specific form is not available).</li> <li>● Students are expected to use appropriate resources and various levels of evidence; primary, secondary and tertiary references and should also use more than one resource for each question. All answers to be discussed with the preceptor.</li> </ul>	
<p><b>Interprofessional Collaboration</b></p> <ul style="list-style-type: none"> <li>● It is suggested that students use Inter-professional Student Shadowing cards developed by the Health Sciences Council (UofA) to guide expectations and discussion. Cards can be printed by going to: <a href="http://issuu.com/hserc/docs/student_s_guide_to_interprofessional_shadowing/2">http://issuu.com/hserc/docs/student_s_guide_to_interprofessional_shadowing/2</a></li> <li>● It is important that the student thanks the health care professional for their time spent with the student. This can be in the method of choice by the student; verbal, email, card, etc.</li> <li>● Prior to the IP visits, students will prepare an expectation of what they want to learn from the experience and review with the preceptor.</li> <li>● During the IP visits, students will work collaboratively and demonstrate respect for the practice and knowledge of other health care professionals.</li> <li>● After the IP visits, students will debrief their experience with their preceptor. Include strategies the preceptor uses to improve/promote collaboration and what barriers may affect professional collaboration.</li> <li>● IP collaboration opportunities with a physician are preferred. If a physician opportunity is not available, alternatives include a PCN or homecare nurse, optometrists, physiotherapists, etc.</li> <li>● Four 1/2-day visits or 2 full days are recommended. We ask that preceptors attempt to maximize the inter-professional opportunities for the student.</li> </ul>	
<p><b>Health Promotion Presentation <u>or</u> Health Awareness Clinic</b></p> <ul style="list-style-type: none"> <li>● Provide a minimum of one health promotion presentation for the public. (e.g. school; teachers or student classes, senior groups, disease advocacy groups, etc). <ul style="list-style-type: none"> <li>○ If an in person presentation is not possible, the student should prepare a recorded presentation that can be used by the pharmacy.</li> </ul> </li> </ul> <p style="text-align: center;">OR</p> <ul style="list-style-type: none"> <li>● Provide a health promotion, screening or education clinic for the public on a disease state or focus for the pharmacy. (e.g. women's health, hypertension). This can be done in the community or the pharmacy.</li> </ul>	
<p><b>Pharmacist for the Day</b></p> <ul style="list-style-type: none"> <li>● Students, with supervision, should assume patient care and dispensing responsibilities as the sole pharmacist at the practice site. Minimum of a ½ day</li> </ul>	

<p>during week 7 of the placement is suggested and can be increased as deemed appropriate by the preceptor. The experience should be debriefed so the student can reflect on their strengths and challenges. The activity may be repeated if needed to better assess if the student is capable and confident regarding these responsibilities.</p>	
<p><b>Preceptor Library Resources</b></p> <ul style="list-style-type: none"> <li>Students provide preceptors with an overview of the library resources and search strategies for the UofA Library Database(s) now accessible to preceptors. <ul style="list-style-type: none"> <li>The How-To-Guide: UofA Faculty of Pharmacy Library Resources is: <a href="http://tinyurl.com/lgppqay">http://tinyurl.com/lgppqay</a></li> <li>The link to the UofA pharmacy library home page is <a href="https://guides.library.ualberta.ca/pharmacy">https://guides.library.ualberta.ca/pharmacy</a></li> </ul> </li> </ul>	
<p><b>OPTIONAL: Practice Based Research</b></p> <ul style="list-style-type: none"> <li>Students may be involved with practice-based research during their placement. Information will be provided prior to the start of the placement. Student participation in research activities is voluntary.</li> </ul>	

## Course Discussions Summary

The following are discussions that students must complete during the placement to meet course objectives.

Topic	✓
<p><b>Practice Site Policy</b></p> <ul style="list-style-type: none"> <li>Review policies / procedures related to equity, diversity and inclusiveness in the practice site. Discuss how the student and preceptor are to manage situations if they arise (patient / staff / other health care professionals / etc).</li> </ul>	
<p><b>Maintaining Professional Competence and Lifelong Learning</b></p> <ul style="list-style-type: none"> <li>Discuss with the preceptor how they maintain professional competence and the ACP Continuing Competence Program.</li> <li>Review the preceptor's previous or current ACP learning / implementation records and compare it to the student's placement Learning Plan.</li> </ul>	
<p><b>Patient Communication</b></p> <ul style="list-style-type: none"> <li>Discuss when and how motivational interviewing and shared decision-making strategies should be used with patients.</li> <li>Discuss communication strategies used by your preceptor(s) to build rapport with patients; include patients with challenging situations such as those who are very ill, have dementia or mental health concerns.</li> </ul>	
<p><b>Medication Distribution Processes and Safety Practices</b> (for sites with a dispensary)</p> <ul style="list-style-type: none"> <li>Discuss documentation and reporting of medication errors/incidents, quality assurance processes and how the pharmacy keeps current with regulatory requirements.</li> <li>Discuss with the preceptor and/or dispensary staff components of the distribution system (e.g. unit dose, ward stock) and the scopes of practice of staff involved (e.g. order entry, filling, checking).</li> <li>Discuss error prevention strategies used to promote safe and accurate dispensing (e.g. dose calculation and checks, double/triple checks, use of technology, technician checking, etc.). Review incidence,</li> </ul>	

<p>tracking of errors and near misses.</p> <ul style="list-style-type: none"> <li>• What is the process for reporting of medication errors or incidents at the site?</li> <li>• What are the policies and processes involved to address safe medication practices (e.g. high alert meds, injectables, narcotics)? How are pharmacy personnel involved with the development and/or promotion of these processes and policies?</li> </ul>	
<p><b>Health Promotion and Advocacy</b></p> <ul style="list-style-type: none"> <li>• Discuss the health promotion or disease prevention programs that the preceptor is involved with and/or are available at the practice site (e.g. immunizations, smoking cessation, travel advice, blood pressure screening, etc.).</li> <li>• Review the health advocacy activities provided by the pharmacy team and the practice site.</li> <li>• Discuss and where possible demonstrate the advocacy and leadership roles of pharmacists such as research involvement, acquisition of compassionate/special access drugs, advocacy for drug coverage, committee involvement, development of patient care protocols.</li> </ul>	
<p><b>Pharmacy Services and Scope of Practice</b></p> <ul style="list-style-type: none"> <li>• <i>(PHARM 554 - Community Practice only)</i> Discuss the impact of funding policies on the provision of professional services and how the expanded scope of practice contributes to patient care. Include the impact of funding policies on the provision of professional services with the pharmacy team.</li> <li>• Discuss obtaining additional prescribing authorization (APA)? What is their professional experience with APA both in obtaining &amp; using it? If they don't have APA, are they planning to obtain it?</li> <li>• If applicable, discuss with the preceptor how they (or other pharmacists with APA) use the expanded scope of practice to contribute to patient care.</li> </ul>	
<p><b>Health Care Team</b></p> <ul style="list-style-type: none"> <li>• Review how the preceptor communicates patient care responsibilities to ensure continuity of care (e.g. patient care hand off)</li> <li>• Discuss communication strategies used to optimize team functioning, including how conflicts are managed (this should include within the pharmacy team and the broader healthcare team).</li> </ul>	
<p><b>Professional Identity</b></p> <ul style="list-style-type: none"> <li>• Discuss how the preceptor engages in the following and how you envision yourself to do so: <ul style="list-style-type: none"> <li>○ Networking opportunities</li> <li>○ Utilization of online platforms ex. LinkedIn</li> <li>○ Contributions to the profession</li> <li>○ Volunteer and Service Work</li> <li>○ Professional memberships and involvement</li> </ul> </li> </ul>	

## Pharm 554 - Community Practice - Assignments

### Assignment #1: Skills Inventory and Learning Plan

There is a short video (7 minutes) labeled "Podcast Part 2", posted [HERE](#) to help preceptors in their role guiding students. Students are required to complete a Skills Inventory, reflect upon feedback they have received to-date, and develop a Learning Plan using the template provided in the syllabus. Once developed, the student will post it to Student Requirements in CORE ELMS for his/her preceptor (or co-preceptor team) for review 1-week prior to start of placement. In consultation with the preceptor(s), the student will refine and finalize the components of the Learning Plan by the end of week 1 of the placement. The revised plan should be posted in CORE ELMS. At midpoint and final, progress updates must be added (by student), and the newest version re-ported to CORE ELMS. This is a living document that should inform the student's personal learning goals. It can be updated to include new goals as needed (including areas that may require improvement after receiving feedback). The student should be taking ownership, and preceptors can support their students to ensure that goals are SMART and achievable in the practice setting.

**Preceptor feedback is important** to ensure that student's learning goals and objectives are appropriate and feasible. Also preceptors can reinforce the importance of self-directed learning and the expectation that students update their progress at midpoint and final in their learning plan is encouraged.

### **Key Student Responsibilities**

- Students develop 3 goals in areas that they feel require development. The Skills Inventory and feedback received to date should inform their creation.
  - ◆ Students determine strategies to achieve each, as well as indicators of progress that will inform if they are achieving their goals.
  - ◆ Students must post a *revised Learning Plan* when progress updates are added (at midpoint and final). The Skills Inventory does not need to be updated at midpoint and final, just the learning plan.
  - ◆ Areas indicated by the preceptor as **“Inconsistently Meeting Expectations”** or **“Not or Rarely Meeting Expectations”** on the midpoint Student Performance Assessment should be added by the student to their midpoint Learning Plan as learning goals. This is to ensure these areas will be addressed in the second half of the placement

### **Key Preceptor Responsibilities**

- Review the Skills Inventory, prior feedback and Learning Plan before the placement starts.
  - ◆ Provide feedback on the feasibility and appropriateness of the goals. Suggest modifications as needed. Goals need to align with what is feasible within the practice setting.
  - ◆ Review progress that student presents at midpoint and final; support and/or suggest strategies for enabling the student to achieve their goals.
  - ◆ Provide feedback on the student's self-assessment ratings for their goals.

### **Assignment #2: Medical Condition Diary**

When providing care for patients with acute care, self-care and chronic diseases, students are to use the [Medical Condition Diary](#) Google form over the course of their rotation.

- As students provide care for patients (i.e. minimum of 20 acute care / self care cases and 20 chronic disease management cases), they are to complete the Google form to document the various conditions encountered when providing care to patients. This diary should help the student broaden their exposure to various medical conditions they encounter.
- Students are to review their Medical Condition Diary with their preceptor during their rotation so that the preceptor can help identify patients with conditions that the student has not been exposed to
  - Students will receive a copy of this form, via email, when they submit it.

*NOTE: Students are not expected to provide care for ALL of the conditions listed in the “Medical Condition Diary”. This is only a guide to assist students and preceptors when determining which patients are selected for care plans.*

### **Assignment #3: Patient Care Assignment**

Students need to provide the following for **4 patients** on the last day of the placement:

- The Pharmacy Care Plan Worksheet (posted in *eClass*) can be used or site specific Comprehensive Annual Care Plans (CACP) or Standard Medication Management Assessments (SMMA) can be submitted. It is suggested that preceptors and students discuss which format is appropriate and most comfortable for the student to use.
- ALL chronic medical conditions should be included in chronic disease management care plans as students should be caring for the patient holistically. If there is no DRP associated with a condition it should be stated in the care plan that the assessment resulted in no DRP for that specific condition but monitoring will be ongoing.
- Each assignment consists of:
  - relevant background data as applicable (reason for consult, past medical history, BPMH, pertinent ROS, relevant labs/diagnostic information)
  - care plan using the pharmacy care plan worksheet or site-specific format

- o corresponding clinical documentation as entered on the patient computer profile if applicable
- o written communication sent to another healthcare professional (if completed)

#### **Assignment #4: Interprofessional Assignment**

Students are to participate in four 1/2-day visits or 2 full days visits within a medical practice in collaboration with the physician or healthcare professional team. The student is expected to demonstrate their professional competencies with the focus on providing effective patient care. This includes development of clinical decision-making and judgment skills as well as gaining an understanding of the opportunities for inter-professional collaboration.

After completion of their visits with a healthcare professional, the student completes the Inter-Professional Survey Assignment on *eClass*. This assignment is due on the last day of the placement.

#### **Assignment #5: Enhancement of Community Pharmacy Practice Assignment**

In collaboration with the preceptor, the student will design and complete a project that will benefit the practice site. Examples include creating a resource or tool for practice, developing a patient brochure, and/or enhancing patient care processes and clinical services. Following completion of the project, the student completes the Enhancement Project Survey questions on *eClass* at the end of the placement. Questions include title/topic, stimulus/trigger, activities completed, potential and real outcomes and what was learned through the completion of the project.

#### **Assignment #6: Continuous Quality Improvement Initiative**

In collaboration with the preceptor, the student will use the ACP's ["The Systems Approach to Quality Assurance for Pharmacy Practice: A Framework for Mitigating Risk"](#) to complete a Failure Mode and Effects Analysis (FMEA) on one aspect of the patient care process within the practice site. This process does not need to be limited to dispensing activities within the practice site - it can be used to prospectively identify and correct processes within the pharmacy that could lead to patient safety incidents. Following completion of the initiative, the student completes the Continuous Quality Improvement Initiative Summary questions on *eClass* at the end of the placement. Questions include description of the activity being analyzed, identification of potential failure modes associated with the activity chosen, and a description of the redesigned process that could be implemented to address the potential failure modes. While the pharmacy may not implement the recommendations during the student's placement, it is expected that the student will create a well constructed plan that will address the failure modes identified.

## APPENDIX 1: PharmD Courses

Below is a snapshot of courses within each year. For the calendar description for each course, please click [HERE](#).

### YEAR 1:

Fall Term	Winter Term
	Pharmaceutics Part 1
Principles of Medicinal Chemistry	Pharmacotherapy Part 1 (Self-care/pulmonary)
Introduction to Pharmacology	
Physiology & Anatomy Parts 1 and 2	
Behavioural, Administrative, Social and Evidence-Based Pharmacy Parts 1 and 2 (focus on pharmacist's role, jurisprudence, drug use control, using evidence in patient care)	
Patient Care Skills Parts 1 and 2 (focus on communication skills and the patient care process - patient assessment, creating patient database, drug therapy workups, patient counselling)	
Foundations of Collaborative Practice	

### YEAR 2:

Fall	Winter
Pharmaceutics 2	Pharmacotherapy 3 (Cardiovascular/Hematology)
Essentials of Pharmacokinetics	Pharmacotherapy 4 (GI/Nutrition/Derm/Ophth)
Pharmacotherapy 2 (Endocrine/Nephrology/Urology)	Pharmacotherapy 5 (ID 1 - bacterial)
Patient Care Skills 3 (focus on hospital scenarios, BPMH, patient interviewing)	Patient Care Skills 4 (focus on hospital scenarios, admission/discharge education, integrating therapeutics)
Behavioural, Administrative, Social and Evidence-Based Pharmacy 3 (focus on ethics/legal, appraising RCTs, health system)	Behavioural, Administrative, Social and Evidence-Based Pharmacy 4 (focus on appraising pharmacoepidemiological studies and practice management)

### YEAR 3:

Fall	Winter
Pharmacotherapy 6 (Sexual/Reproductive Health & MSK/Joint)	Pharmacotherapy 9 (Viral/Fungal/Protozoal Infections, Immunization and Transplant)
Pharmacotherapy 7 (Neurology & Oncology)	Pharmacotherapy 10 (Various populations, integrated approach to patient care issues)
Pharmacotherapy 8 (Pain and Mental Health)	Toxicology: Drugs of Abuse and Related Pharmacology
Patient Care Skills 5 (focus on prescribing and complex patients)	Patient Care Skills 6 (focus on critical thinking and decision making to address complex drug therapy problems)
Behavioural, Administrative, Social and Evidence-Based Pharmacy 5 (focus on societal impacts of a pharmacist)	Behavioural, Administrative, Social and Evidence-Based Pharmacy 6 (focus on business planning, social theory and pharmacy practice research)

## APPENDIX 2: Clinical Expectations for Care Provider Role for PharmD Students Across Y4

### Experiential Courses: Guidance for Preceptors and Students

During 4<sup>th</sup> year, students in the PharmD program complete **three 8-week patient care experiences**, and **one 8-week mandatory 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.

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

### APPENDIX 3: Pharmacy Care Plan Worksheet with Checklist for Assessment

When using, think about the level of the student, where they are in APPE sequence and topics/skills covered in the curriculum-to-date. Students will likely require assistance for new/emerging therapeutics areas.

Pharmacy Care Plan Worksheet with Checklist
<p><b>MEDICAL CONDITIONS &amp; MED- RELATED NEEDS:</b> 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.  <b>DRP Categories:</b> unnecessary drug • drug therapy required • ineffective drug • dose too low • adverse drug reaction/interaction • dose too high • nonadherence</p>
<p><input type="checkbox"/> Are all DRPs identified (based on 4 prime areas of <b>indication, efficacy, safety, adherence</b>)?  <input type="checkbox"/> If no, discuss with the student; probe to see if those missing can be determined.  <input type="checkbox"/> Is rationale provided or discussed for DRPs (based on either patient or provider data)?</p>
<p><b>GOALS OF THERAPY:</b> For each medical condition and/or DRP state desired goals of therapy/time frame.  <b>Goals:</b> cure, prevent, slow/stop progression, reduce/eliminate symptoms, normalize a lab value.  <i>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.</i></p>
<p><input type="checkbox"/> Therapeutic goal/outcome(s) stated?  <input type="checkbox"/> Patient goal incorporated (if appropriate)</p>
<p><b>ALTERNATIVES:</b> Compare relevant drug and non-drug therapies that will produce desired goals. List the <i>pros</i> and <i>cons</i> of each therapy as well as rationale for each being included.  <i>Consider: Indication • Efficacy • Safety • Adherence • Cost/coverage</i></p>
<p><input type="checkbox"/> Is an assessment of each DRP provided (factors considered to influence/determine a plan)?  <input type="checkbox"/> Are alternatives (with rationale for each) provided that would be considered acceptable for the current level of student(s)?</p>
<p><b>RECOMMENDATIONS/ PLAN:</b> 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.  <i>Consider: Drugs: correct drug, formulation, route, dose, frequency, schedule, duration, medication management. Non-drug: non-drug measures, education, patient referral.</i></p>
<p><input type="checkbox"/> Plan/recommendations are outlined  Includes:  <input type="checkbox"/> dosing considerations  <input type="checkbox"/> patient preferences</p> <p><b>ACTIONS TAKEN</b>  <input type="checkbox"/> Appropriate/acceptable action has been taken</p>
MONITORING PLAN
<p><b>MONITORING PARAMETERS:</b> Determine the parameters for monitoring <i>efficacy</i> and <i>safety</i> for each therapy. Provide rationale for including this and how you expect the parameter to change.  <i>Consider: Clinical &amp; laboratory parameters • The degree of change • The time frame</i></p>
<p><input type="checkbox"/> Monitoring plan present  Includes: <input type="checkbox"/> safety <input type="checkbox"/> efficacy <input type="checkbox"/> frequency <input type="checkbox"/> duration (if appropriate)  <input type="checkbox"/> which healthcare provider will follow-up</p>
<p><b>FOLLOW-UP:</b> Determine <i>who</i>, <i>how</i> and <i>when</i> follow-up will occur.</p>
<p><input type="checkbox"/> Follow-up plan present  Includes:  <input type="checkbox"/> who <input type="checkbox"/> how <input type="checkbox"/> when <input type="checkbox"/> includes outcome (if possible)</p>

Adapted with permission from the Division of Pharmacy Practice, Leslie Dan Faculty of Pharmacy, University of Toronto, 2011.  
Excerpt from Patient Care Process, Faculty of Pharmacy and Pharmaceutical Sciences, University of Alberta, 2018



## APPENDIX 4 (Pharm 554 - Community Practice): Assignment and Assessment Schedule/Checklist

WEEK	STUDENT ACTIVITIES
<b>1-4 weeks before placement starts</b>	Students should ensure they have: <ul style="list-style-type: none"> <li><input type="checkbox"/> Posted updated CV/resume in CORE ELMS</li> <li><input type="checkbox"/> Reviewed therapeutics as instructed by the preceptor or relevant to the practice area.</li> <li><input type="checkbox"/> Reviewed syllabus and required readings (in syllabus and eClass): be aware of course expectations, activities and assignments.</li> <li><input type="checkbox"/> Corresponding with the preceptor; start time, dress code, parking, pre-readings, etc.</li> <li><input type="checkbox"/> Provided their preceptor with their Netcare registration form.</li> <li><input type="checkbox"/> Started to develop a Learning Plan: post on CORE ELMS at least 1 week prior to placement. (include posting date on title)</li> </ul>
<b>Daily throughout the placement</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Provide Patient Care, review with preceptor.               <ul style="list-style-type: none"> <li>Patient Assessments:                   <ul style="list-style-type: none"> <li>○ Acute condition patients (e.g. pain, infection, GERD, etc). Minimum: 20 patients in 8 weeks.</li> <li>○ Chronic medical condition patients. Minimum: 20 care plans in 8 weeks.</li> <li>○ Complete Medical Condition Diary for all patient interactions.</li> </ul> </li> </ul> </li> <li><input type="checkbox"/> Prepare care plans for ALL patients using pharmacy care plan worksheet or practice specific forms; document care provided according to site processes.</li> <li><input type="checkbox"/> Complete medical and drug information requests.</li> <li><input type="checkbox"/> Participate in Patient Education; Rx and OTC counselling and follow -ups.</li> <li><input type="checkbox"/> Participate in Pharmacy Services; injections, Rx adaptations and renewals, emergency prescribing, prescribing (if pharmacist has authority) under direct supervision.</li> </ul>
<b>WEEK 1: Orientation, Create Placement Schedule</b> <b>Dates:</b> _____	
<b>Orientation</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Review and discuss the Skills Inventory and Learning Plan.</li> <li><input type="checkbox"/> Review course objectives and activities</li> <li><input type="checkbox"/> Discuss preliminary schedule: Inter-Professional visits, clinics, presentations</li> <li><input type="checkbox"/> Discuss student/preceptor expectations and responsibilities.</li> <li><input type="checkbox"/> Discuss assessment processes and timelines (including informal/daily feedback)</li> <li><input type="checkbox"/> Tour of site</li> <li><input type="checkbox"/> Review site specific procedures (including emergency procedures in event of disturbances, fire, forgery, needle stick injury, robbery, etc.)</li> <li><input type="checkbox"/> Discuss with your preceptor what you should do if faced with a difficult, abusive, racist patient or staff person, including microaggressions. Bring to the preceptors attention for appropriate action, debrief together, report and document, as well as contact faculty. Discuss the possibility of having a “safety signal” so that you (the student) can gesture to your preceptor if you need assistance.</li> <li><input type="checkbox"/> Verify Netcare access</li> </ul>

<b>Daily Patient Care</b>	<input type="checkbox"/> Discuss care plans, clinical documentation; format and process. <input type="checkbox"/> Discuss and complete assessments related to new and refill Rx's. <input type="checkbox"/> Discuss and establish expectations for the student around the dispensing processes within the pharmacy. <input type="checkbox"/> Provide care for at least 1 Acute Condition patient (review indication, effectiveness, safety and adherence) each day. Discuss with the preceptor and document on the patient's profile. <input type="checkbox"/> Schedule first Chronic Condition Patient Management review for week 2. Plan patient assessment; review profile, Netcare, discuss plan with preceptor.
<b>Additional Activities to be incorporated and scheduled across the placement</b>	<input type="checkbox"/> Discuss Continuous Quality Improvement activity - plan for the FMEA <input type="checkbox"/> Schedule and arrange visits with MD or HCP (Inter-professional activity) <input type="checkbox"/> Discuss/schedule the health promotion presentation or clinic day in the pharmacy. <input type="checkbox"/> Discuss topic and scope of Community Pharmacy Practice Enhancement Project. <input type="checkbox"/> Ensure <a href="#">APPE discussions</a> are scheduled and completed during the rotation.
<b>WEEK 2: Dates:</b> _____	
<b>Daily Patient Care</b>	<input type="checkbox"/> Continue to complete assessments related to new and refill Rx's. <input type="checkbox"/> Continue to participate in dispensing related activities. <input type="checkbox"/> Continue Acute Condition assessments. <input type="checkbox"/> Conduct a Chronic Condition Patient Management session for the first patient and schedule additional reviews. <input type="checkbox"/> Consider a scenario for clinical judgment activity; review written summary.
<b>WEEK 3: Dates:</b> _____	
<b>Daily Patient Care</b>	<input type="checkbox"/> Continue to complete assessments related to new and refill Rx's. <input type="checkbox"/> Continue to participate in dispensing related activities. <input type="checkbox"/> Continue Acute Condition assessments. <input type="checkbox"/> Conduct additional Chronic Condition Patient Management sessions and schedule additional reviews. <input type="checkbox"/> Consider a scenario for clinical judgment assignment; review written summary.
<b>Quality Improvement</b>	<input type="checkbox"/> Start FMEA review process.
<b>WEEK 4: Dates:</b> _____	
<b>Daily Patient Care</b>	<input type="checkbox"/> Continue to complete assessments related to new and refill Rx's. <input type="checkbox"/> Continue to participate in dispensing related activities. <input type="checkbox"/> Continue Acute Condition assessments. <input type="checkbox"/> Conduct additional Chronic Condition Patient Management sessions and schedule additional reviews. <input type="checkbox"/> Consider a scenario for clinical judgment assignment; review written summary.
<b>Additional Course Activities</b>	<input type="checkbox"/> Ensure health care professional visits are scheduled. <input type="checkbox"/> Review progress on projects, presentations, clinics.

	<input type="checkbox"/> If not completed, review the written Clinical Judgment Summary with the preceptor. At least 3 conversations involving clinical judgment must occur over the 8 week rotation.
<b>Mid-Point Evaluations and Learning Plan</b>	<input type="checkbox"/> Submit MID-POINT Student Self-Assessment 2 days prior to the Performance Assessment session to allow time for preceptor review. Discuss with the preceptor at the review session. <input type="checkbox"/> Submit MID-POINT Student Performance Assessment (Completed by preceptor and reviewed with the student) <input type="checkbox"/> Submit MID-POINT Student Evaluation of Preceptor and Site (Completed by student and reviewed with the preceptor) <input type="checkbox"/> Update Learning Plan with progress. If any outcomes from the MID-POINT Student Performance Assessment are identified with a rating of "Needs Improvement," the student MUST update their Learning Plan on CORE ELMS with goals, strategies and plans related to these elements.
<b>WEEK 5: Dates:</b> _____	
<b>Daily Patient Care</b>	<input type="checkbox"/> Continue to complete assessments related to new and refill Rxs. <input type="checkbox"/> Continue to participate in dispensing related activities. <input type="checkbox"/> Continue Acute Condition assessments (should have 10-12 completed by now). <input type="checkbox"/> Conduct additional Chronic Condition Patient Management sessions and schedule additional reviews (should have 10-12 completed by now). <input type="checkbox"/> If applicable, provide follow up to care plans completed earlier in the rotation. <u>Check-in</u> <input type="checkbox"/> Assess completion of course activities and APPE discussions (review schedule / adapt as needed)
<b>WEEK 6: Dates:</b> _____	
<b>Daily Patient Care</b>	<input type="checkbox"/> Continue to complete assessments related to new and refill Rxs. <input type="checkbox"/> Continue to participate in dispensing related activities. <input type="checkbox"/> Continue Acute Condition assessments (should have 14-16 completed by now). <input type="checkbox"/> Conduct additional Chronic Condition Patient Management sessions and schedule additional reviews (should have 14-16 completed by now). <input type="checkbox"/> If applicable, provide follow up to care plans completed earlier in the rotation.
<b>Additional Course Activities</b>	<input type="checkbox"/> Complete Physician/Healthcare Inter-professional visits.
<b>WEEK 7: Dates:</b> _____	
<b>Daily Patient Care</b>	<input type="checkbox"/> Continue to complete assessments related to new and refill Rxs. <input type="checkbox"/> Continue to participate in dispensing related activities. <input type="checkbox"/> Continue Acute Condition assessments (should have 16-18 completed by now). <input type="checkbox"/> Conduct additional Chronic Condition Patient Management sessions and schedule additional reviews (should have 16-18 completed by now). <input type="checkbox"/> If applicable, provide follow up to care plans completed earlier in the rotation.

<b>Additional Course Activities</b>	<input type="checkbox"/> Conduct “Pharmacist for the Day” activity early in the week. Debrief with the preceptor afterwards. Repeat later in the week as needed. <input type="checkbox"/> Complete discussions with the preceptor: professionalism, communication, health promotion. Inter-professional practice, dispensing practices, medication safety, etc. <input type="checkbox"/> Ensure minimum 3 Clinical Judgment summaries/discussions have been completed. <input type="checkbox"/> Complete HCP inter-professional visit debrief with preceptor(s).
<b>WEEK 8: Dates:</b> _____	
<b>Daily Patient Care</b>	<input type="checkbox"/> Continue to complete assessments related to new and refill Rx's. <input type="checkbox"/> Continue to participate in dispensing related activities. <input type="checkbox"/> Continue Acute Condition assessments (minimum of 20). <input type="checkbox"/> Conduct additional Chronic Condition Patient Management sessions and schedule additional reviews (minimum of 20). <input type="checkbox"/> If applicable, provide follow up to care plans completed earlier in the rotation.
<b>Ensure continuity of care and finalize activities and assignments</b>	<input type="checkbox"/> Ensure continuity of care documentation is entered into patient profiles and conveyed to patients and/or pharmacy team members. <input type="checkbox"/> Finalize FMEA review. <input type="checkbox"/> Review activities, discussions and assignments to ensure all have been completed. <input type="checkbox"/> Ensure completion of: minimum of 1 community presentation OR 1 health promotion activity/clinic in the pharmacy. <input type="checkbox"/> Finalize Enhancement of Community Pharmacy Practice Project.
<b>FINAL Assessments</b>	<b>Final Assessments (CORE ELMS)</b> <input type="checkbox"/> Submit FINAL Student Self-Assessment 2 days prior to the Performance Assessment session to allow time for preceptor review. Discuss with the preceptor at the review session. <input type="checkbox"/> Submit FINAL Student Performance Assessment (Completed by preceptor and reviewed with the student) <input type="checkbox"/> Submit FINAL Student Evaluation of Preceptor and Site (Completed by student and reviewed with the preceptor)
<b>Posting of Assignments, Evaluations and Surveys</b>	<b>Assignments are to be posted by last day of placement</b> <input type="checkbox"/> Google Form: ensure Medical Condition Diary is complete / updated <input type="checkbox"/> eClass: post FOUR care plans for the Chronic Disease Care Plan Assignment <input type="checkbox"/> eClass: complete Enhancement of Community Pharmacy Practice Project Summary <input type="checkbox"/> eClass: complete Continuous Quality Improvement Initiative Project Summary (i.e. FMEA project) <input type="checkbox"/> eClass: complete Interprofessional Assignment survey <input type="checkbox"/> CORE ELMS: Updated Learning Plan <input type="checkbox"/> CORE ELMS: Post-Course Evaluation of Preceptor and Practice Setting (Note: Submit AFTER leaving site; due 48 hours after placement completion. This survey is NOT visible to the preceptor.) <input type="checkbox"/> Submit Preceptor Recognition form (link emailed to student)

**Preceptor to  
Complete Course  
Evaluation**

Preceptor to complete Preceptor Course Evaluation (in CORE ELMS)

## APPENDIX 5: Orientation Checklist for Student and Preceptor

This orientation checklist is to be used by both the student and preceptor to cover important topics at the beginning of the placement. Site specific items can be added to the list at the bottom.

Orientation Activity	√
<p><b>1. Professional Discussions</b></p> <ul style="list-style-type: none"> <li>• Preceptor’s practice experience and interests</li> <li>• Feedback and communication including preceptors preferred method of contact</li> <li>• Student/preceptor responsibilities and expectations including preceptor review of assignments, provision of feedback and student’s submission of assignments or documentation for review</li> <li>• Practice expectations, patient confidentiality, dress and appearance policies</li> <li>• Practice setting information regarding policies and procedures, including patient and staff safety</li> <li>• Information regarding professional and pharmacy activities</li> <li>• Discuss student-prepared Skills Inventory, prior feedback and Learning Plan</li> <li>• Discuss with students what they should do if faced with a difficult, abusive, racist patient or staff person, including microaggressions. Bring to the preceptors attention for appropriate action, debrief together, report and document, as well as contact faculty. Discuss with students the possibility of having a “safety signal” so that the student can gesture to their preceptor if they need assistance.</li> <li>• Preceptor to review worksite specific occupational health and safety requirements and responsibilities as it relates to workplace safety (refer to the Policy and Procedures Manual for additional details).</li> </ul>	<p>—</p> <p>—</p> <p>—</p> <p>—</p> <p>—</p> <p>—</p> <p>—</p> <p>—</p> <p>—</p> <p>—</p>
<p><b>2. Course Discussions; review course syllabus</b></p> <ul style="list-style-type: none"> <li>• Objectives</li> <li>• Activities: patient care, presentations, in-services, projects, etc.</li> <li>• Assignments</li> <li>• Assessment process: review forms (Student Performance Assessment in syllabus) and timing</li> <li>• Discuss student/preceptor responsibilities and expectations</li> <li>• Review preliminary student schedule; modifiable calendar available on <a href="#">website</a></li> </ul>	<p>—</p> <p>—</p> <p>—</p> <p>—</p> <p>—</p> <p>—</p>
<p><b>3. Pharmacy Practice</b></p> <ul style="list-style-type: none"> <li>• Practice specialties and characteristics</li> <li>• Site resources and learning opportunities</li> <li>• How will the student be involved in patient care?</li> <li>• Provide samples of forms used, documentation policies and procedures</li> </ul>	<p>—</p> <p>—</p> <p>—</p> <p>—</p>
<p><b>4. Practice Environment</b></p> <ul style="list-style-type: none"> <li>• Guided tour of practice environment</li> <li>• Introduction to staff; include roles and how they will be involved with student experience</li> <li>• Library, drug information and other resources</li> <li>• Student workspace</li> <li>• Eating area, lockers, washrooms, etc.</li> </ul>	<p>—</p> <p>—</p> <p>—</p> <p>—</p> <p>—</p>
<p><b>5. Technology orientation</b></p> <ul style="list-style-type: none"> <li>• Computer order entry systems</li> <li>• Phone, fax, internet</li> </ul>	<p>—</p> <p>—</p>
<p><b>6. Other</b></p>	