



Preceptor Guide

Experiential Learning

Acknowledgments

The Faculty would like to acknowledge the valuable contributions of the preceptors throughout the province involved with the evolution and progression of all the Experiential Education courses. It is the willingness and commitment of practicing pharmacists acting as mentors for pharmacy students that are the foundation and strength of our program.

We would like to thank Red Deer College for granting permission to adapt parts of their guide, *Preparing to be a Preceptor: A handbook for health care aide preceptors*.¹

We would also like to thank the University of British Columbia, Office of Faculty Development, for granting permission to adapt parts of their guide *Teaching Skills for Community Based Preceptors*.³

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Message from the Director

Someone once told me that preceptors are the heart of the pharmacy program - and I believe this to be true. Preceptors are integral to our students' transition to a pharmacist because you invest your time to support, coach, mentor, guide, debrief, and evaluate our students. It is this unwavering dedication that ensures that the Faculty graduates knowledgeable, professional, and skilled pharmacists.

I also believe being a preceptor is a journey of learning and growth along with your student. To support you in this important role, we have created this guide as a means to share our perspective, provide you with direction, and also answer or provide our interpretation of commonly asked questions on various experiential education topics. It also serves as a common place to share information and advice more broadly. While some aspects of experiential education (and this guide) are quite concrete and straightforward, you will see that aspects are "shades of gray", so we have provided our perspective.

We want this guide to meet your needs, and therefore we view this as a dynamic document that will evolve and improve as we work together to create an exemplary program for our future colleagues.

This guide has been designed for preceptors working with students in both the BScPharm and the PharmD programs. Included is a range of topics including how to get started as a preceptor, course-specific guidance, the importance of student assessments, how to deal with "at risk" students, and answers to frequently asked questions. Please review the table of contents to be familiar with and become aware of all the items discussed and covered in this guide.

This is version 6 with updates to both the BScPharm and PharmD programs included. – We continue to incorporate your suggestions! The guide will always be available in the Document Library in RXpreceptor as well as on our [Faculty website](#). As always, we invite your comments and welcome your feedback. Please contact me directly at athompson@ualberta.ca or 780-492-5905 with any of your suggestions. Thank you for your continued commitment and dedication to the education and training of our students.



Ann Thompson,
Director, Experiential Education

Experiential Education Mission and Purpose

Mission

The faculty will foster high quality experiential education by recruiting, retaining, and supporting exemplary preceptors in diverse practice settings throughout the province, in order to provide students with optimal learning opportunities, and graduate pharmacists capable of meeting the needs of society.

Purpose of the Preceptor Guide

This preceptor guide is applicable to all undergraduate student placements, including the PharmD for Practicing Pharmacists Program, and came to fruition as a result of feedback from our valued preceptors. We set out to create a guide that is a handy and brief reference to answer any questions you may have from the beginning of your student's placement to the end, and to provide a range of information and suggestions for you regardless of the year of student you are precepting. Should you require more detailed information, please refer to the applicable course syllabus for the student you are precepting

Experiential Education Faculty

Please contact Experiential Education Administrative Services at phexed@ualberta.ca for all general inquiries. Other roles in our office include course development and delivery, and student advising.

Should you have a question specifically about a course, a student concern, or feedback for our consideration, you can contact the appropriate team member listed below.



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Benefits of Precepting

Connecting Practice and Education

Precepting a student provides an opportunity to nurture and promote our profession, develop personally and influence the maturation and education of our future colleagues. *Think back to your experience as a student* - preceptors and mentors can play a significant role in the professional development of students.

There are many benefits associated with being a preceptor

- You can help a student make that important step from classroom to practice.
- It is gratifying to see a student's knowledge and confidence expand and grow from your efforts.
- Students can expose you to new perspectives and knowledge, as well as challenge and re-energize your interest in learning.
- You will be a mentor – preceptors wear many hats; educator, coach, cheer leader! One of the most satisfying is knowing you have mentored someone from student to colleague.
- You can showcase your workplace and attract students to your organization.
- Students can help to promote your practice. As pharmacy practice evolves, it is sometimes difficult to keep up with the advancements. Students can assist with projects and patient care initiatives to aid, practice change can occur.
- You are involved in the education of future pharmacists – you have the “wisdom of practice and “professional expertise. These skills cannot be taught in a classroom.

These placements are an important component of our curriculum and preceptors are the foundation of our Experiential Education Program. We acknowledge the responsibilities involved and continue to search for optimal ways to provide support and training to our preceptors. Currently the following opportunities are available:

- Preceptor [development workshops](#)
- Preceptor development [online modules](#)
- University of Alberta [Library access](#)
- Contributions to your ACP Professional Portfolio. Educational activities related to precepting can be documented as [learning records](#) and integration of precepting may be documented as an implementation record in your ACP professional portfolio.





Preceptor Faculty Appointments & Library Access

As a preceptor, you are essential in preparing students to be confident pharmacist graduates who are ready to enter practice. We are pleased to be able to offer academic appointments to preceptors in recognition of their critical role in the education of our students.

There are two academic titles now available to preceptors at the Faculty. They are:

1. Clinical Preceptor – every preceptor receives this appointment which includes 120 days of library access corresponding to the term in which you are precepting. The form for library access can be found in RXpreceptor under the Documents Library tab, or [online](#).
2. Clinical Academic Colleague (CAC) – this appointment is available to preceptors have precepted or have offered to precept students in the last 2 out of 3 years. Please [click here](#) to apply now!

This appointment includes:

- Issuance of a University ONECard
 - Library privileges deemed appropriate by the chief librarian to that status.
 - Access to Physical Education facilities upon payment of an annual user fee.
- Entitlement to a secondary [University of Alberta CCID](#) to be used for University.
- Eligible to University parking with rates as defined by the Parking Services Fee Structure.
- Eligibility for membership in the Faculty Club.

The CAC designation is for a 3-year term with annual confirmation of participation in the program.

Remember, you are a one of our colleagues and part of our Faculty. You are wished continued success in your practice and with precepting your student!

MyCred: e-Portfolio for Preceptors

Students will be using this online tool to share their personal and professional information (resume) and Learning Goals with you. Preceptors are encouraged to use MyCred themselves to house their personal and professional documentation as it is available for 5 years at no charge. Whether you're seeking a growth opportunity, preparing for an annual review, we think MyCred gives you the portfolio you may need.

For instructions for setup and use, please refer to the mini tutorial posted in the Document Library in RxPreceptor.



Awards & Recognition

Preceptor of the Year Award

The Faculty and students at the University of Alberta's Faculty of Pharmacy and Pharmaceutical Sciences are very grateful to our preceptors. We are proud to acknowledge your contributions to the development of future pharmacists in Alberta, by way of two award programs offered annually.

Through sponsorship of [Teva Canada](#) we are fortunate to be able to award [Preceptor of the Year](#) to deserving recipients each year.

Value: \$300 and Etched Crystal Arch

Criteria: This award will be granted annually to pharmacists who serve as primary or co-primary preceptors for students involved in experiential rotations in Institutional and Community practice settings. Preceptors will be chosen on the basis of; communication and collaboration skills; demonstrated professionalism; models ethical decision making; leadership and advocacy of patients and the profession.

Eligibility: Paid staff of the Faculty of Pharmacy and Pharmaceutical Sciences at the UofA, are *ineligible* to receive the Preceptor of the Year Award. All nominees for Preceptor of the Year will be granted the Preceptor Recognition Award on the basis of exemplary skills in preceptorship.

Nomination Procedures: Student nominations are accepted by way of RxPreceptor, and can be submitted up to one week following placement conclusion. Recipients are chosen by way of committee adjudication.

Preceptor Recognition Award Program

The Faculty and students of the Faculty of Pharmacy and Pharmaceutical Sciences have also partnered to recognize outstanding preceptors who meet the criteria linked to an annual *Preceptor Recognition Theme* with our [Preceptor Recognition Award Program](#).

Value: Certificate and Recipient Pin

Preceptor Criteria: Visit our website to view the recognition award criteria currently being used to determine eligibility for these awards.

Eligibility: All preceptors and co-preceptors for students participating in Experiential Education placements with the Faculty of Pharmacy at the University of Alberta, are eligible to receive this award.

Student nominations are accepted by way of RxPreceptor survey, and can be submitted up to one week following placement conclusion. All nominees meeting the award criteria, will receive a certificate and recipient pin.

Let's Get Started!

- Ensure that you are in compliance with the [Preceptor and Site Requirements](#)
- Complete the online [Preceptor Enrollment and Consent Form](#)
- Decide what course you would like to precept. You are welcome to discuss this with the Faculty Liaison for your practice setting.
- [Register](#) for live or online preceptor development training
- Explore the vast selection of [Preceptor Resources](#), to get you on your way

RxPreceptor Online Account Setup and Maintenance

The Faculty uses RXpreceptor, an online database management program, for various purposes. It manages the recruitment and matching process, houses forms and resources, allows for correspondence between the Faculty, preceptors and students as well as completion and submission of placement assessments. All new preceptors must complete the online [Preceptor Enrollment](#) form in order to have an RXpreceptor account created. In the event of a change to your placement type or site, please complete our [Preceptor Information Update form](#) for existing preceptors. This helps us stay in touch and ensure your account remains up to date!

What year of student should I start with?

The year of student you start precepting depends on your practice, level of learner you are interested in precepting and the amount of time you have for student supervision. If you are unsure where to begin, contact us to discuss student level and course offerings.

Models of Precepting

Experiential education in Pharmacy has mainly followed a traditional 1:1 model of one preceptor mentoring one student in the practice environment. As we advance the practice of precepting, quality of placement experiences and identify strategies to increase capacity, various novel models of precepting have been explored and initiated. These are supported by evidence in the literature from various other health professions and within the pharmacy profession.

The following descriptions, links to resources and documents are intended to support sites and preceptors as you explore, consider, plan and implement nontraditional models of precepting into your practice.

- [Peer- Assisted Learning \(PAL\) Model](#)
 - [Near Peer Teaching Model](#)
 - [Co-Precepting Model](#)

Course Syllabi

For extensive information regarding the course you are precepting, we have posted the complete student syllabi on our [website](#) and within the Document Library in RxPreceptor. Prior to each placement, a Preceptor Quick Reference Guide including course information and tips will be emailed to you shortly before your student arrives.

Early Practice Experiences

Students will require more direct supervision as they are just beginning their practice based learning. These introductory experiences focus on socialization into the profession, communication skill development and practicing systematic processes for providing patient centered care. If you enjoy teaching a new learner and helping them develop foundational skills and are able to invest the time in direct supervision, this is a great place to start.

Course	Number of weeks for placement	Number of hours in placement week	Comments
Pharm 300 1 st Year Service Learning	Both Fall and Winter terms	Approx. 25 hours/term	The volunteer coordinator and supervisor, in conjunction with the student, will plan the activities and schedule. Students are expected to participate in activities at the site on a regular basis to optimize program planning for the residents/clients.
Pharm 305 1 st Year Community Rotation	4	40	It is recommended that the student spends at least <u>50% of the time with the primary preceptor</u> . It may be necessary for the student to devote more than the allotted time to complete all the objectives and activities. Evening and weekends, or any time the student is not at the placement site, would be appropriate times to research information thereby allowing for optimal patient-contact time and preceptor discussion time during the day.
Pharm 316 2 nd Year Institutional Rotation	4	40	

Advanced Practice Experiences

If you have a practice you would like to promote, with limited time for direct student supervision, an advanced learner may be a better match. Advanced students are expected to be more independent in their learning, and have a broader knowledge base.

Course	Number of weeks for placement	Number of hours in placement week	Comments
Pharmacy 426 4 th Year Community Pharmacy 428 4 th Year Institutional	2 x 8 weeks (16 weeks total)	40	It is recommended that the student spends at least <u>50% of the time with the primary preceptor</u> . It may be necessary for the student to devote more than the allotted time to complete all the objectives and activities. Evening and weekends, or any time the student is not at the placement site, would be appropriate times to research information thereby allowing for optimal patient-contact time and preceptor discussion time during the day.
Pharmacy 455 4 th Year Elective	Variable depending on practice site	120 hours total (schedule varies based on practice site)	
PharmD for Practicing Pharmacists Experiential Learning (Pharmacy 511, 512, 513, 514 and 515)	6 x 6 weeks	40	



TIP: There are schedules in the Pharm 305, 426 and 428 Course Syllabi to assist with ensuring that all activities, assessments, and assignments are completed. To access the Course Syllabi, please go to the respective link on our [course information](#) page.

Pharm D for Practicing Pharmacists

The PharmD for Practicing Pharmacists program is an option for both part-time and full-time practitioners. Practitioners can precept independently or collaborate with another pharmacist or non-pharmacist colleague to co-precept the student. The focus of this program is to prepare pharmacists to fulfil changing professional and societal needs by enhancing their patient care, critical thinking, clinical judgment and evidence based medicine skills. Students are expected to be independent and self-directed learners.

As the students are licensed pharmacists, they may perform restricted activities under indirect supervision once the preceptor has determined an appropriate level of competence. The guiding directive during a placement is to ensure that students are appropriately supervised to ensure patient safety is upheld. Given that practice settings are varied, it is important for the preceptor and the student to establish expectations of what can be done under indirect supervision. Patient safety must always guide the amount of supervision that a student requires. Students will require more supervision at the beginning of the program and each placement. As they progress through the placement and the program, the preceptor should adjust the level of supervision based on the practice environment and the students demonstrated competence.

If a student has authorization to perform a restricted activity that the preceptor does not routinely perform in his or her practice, the student and the preceptor must establish if and how the student should integrate this activity into the practice environment.

Pharm D Site Description

As a PharmD Preceptor, you are required to complete a Site Description (formerly called placement outline) for each placement offered in a given academic year. You will be provided with a Google Doc template. The placement outline communicates expectations about the area and level of knowledge and skill development for your placement. Faculty, students and preceptors will use the placement outline to guide specific learning objectives and activities during the placement. The Course Coordinator is available to assist with developing the placement outline, and will also approve it once prepared.

Qualities of an Effective Preceptor

Preceptors need to wear many hats: coach, teacher, facilitator, evaluator, mentor and role model. And with these “hats” come a multitude of qualities and abilities that enable you to perform these roles.

First and foremost, an effective preceptor demonstrates outstanding communication skills; verbal and written communication, and the ability to listen and ask questions. This helps to build a two way relationship with your student as well as model the skills necessary for a student to be an effective pharmacist.

It is also important that preceptors model the appropriate leadership skills, provide students with opportunities to be leaders in their placement and also to expose them to a variety of leadership activities.² Preceptors also need to be able to demonstrate professional expertise, collegiality, and professionalism; this gives the students a role model to which they can aspire.⁷

At the 2007 Pharmacy Experiential Programs of Canada (PEP-C) annual meeting (a special interest group with the Association of Faculties of Pharmacy of Canada), a list of desired qualities of a preceptor was created. This list was intended to guide preceptor selection & self-assessment of readiness to precept. The CanExEd (Canadian Experiential Education) Project for Pharmacy revisited this list of qualities in its aim to bring a national approach to preceptor development. A list of competencies or qualities from each source was extracted and compared to the PEP-C list of desired qualities of a preceptor. Recurring, overlapping and additional themes were identified. Based on the analysis, a proposed list of pharmacist preceptor competencies & performance indicators (see [Appendix F](#)) was created. The AFPC Educational Outcomes for First Professional Degree, NAPRA Competencies for Pharmacists at Entry to Practice and CIHC National Interprofessional Competency framework were reviewed and compared to this list to verify consistency.



TIP: Think out loud to help to share the thought processes involved in making clinical judgments and decisions. Share your experiences and expertise as well as your practice with your student.



TIP: For more information about effective precepting, please refer to the online resource **UBC E-tips for Practice Education**, Module 3 – [Enhancing Your Teaching Skills](#). Also, visit the Dalhousie University [Preceptor eLearning Course](#), Closing Video – A Student’s Perspective, at for a student’s thoughts on Preceptorship, including attributes of a preceptor.



TIP: Regardless of learner level, it is important to make time daily (or at a reasonable interval) to debrief and provide feedback to the student about his/her decisions and progress on a regular basis. This is where the learning occurs – when the student is challenged to justify their decisions, explain their rationale, and discuss their patient care plan with you.



Preceptor Responsibilities

Information is being provided to prepare you and your site for a successful placement with your student. In addition to the mandatory [individual and site requirements](#), preceptors must agree to:

- Commit to meet the following preceptor responsibilities including:
 - Prepare for the placement in advance of the student start date
 - Provide an orientation for the student
 - Fulfill course objectives
 - Provide learning opportunities and supervise student activities
 - Meet with the student at appropriate intervals according to the course requirements to discuss progress with course requirements
 - Provide ongoing, timely and constructive feedback to the student
 - Complete required assessments of student performance
 - Contact the course coordinator if any issues arise during the placement

Checklists have also been developed to assist and guide you prior to, during, and at the end of the placement. These can be found in [Appendix A](#) and we encourage you to copy them and have them on hand as you prepare for your student.

Required Level of Supervision

In accordance with the Alberta College of Pharmacists guidelines, The Faculty of Pharmacy and Pharmaceutical Sciences, has outlined the requirements for levels of supervision during a placement. The guiding directive during a placement is that preceptors will ensure that students are appropriately supervised to ensure patient safety is upheld.

Direct supervision by a pharmacist is required for all restricted activities. These include:

1. To dispense, compound, provide for selling or sell a Schedule 1 drug or Schedule 2 drug
2. To administer a vaccine or parenteral nutrition
3. To prescribe a Schedule 1 drug for the purpose of adapting an existing prescription
4. To prescribe a Schedule 1 drug if it is not reasonable for the patient to see a health professional to obtain the prescription and there is an immediate need for drug therapy

Indirect Supervision for non-restricted activities is left to your discretion. Early level students (years 1-3) will require more direct supervision than advanced or final year students. Also, your student will require more supervision at the beginning of the placement and gradually will require less supervision later in the placement. Patient safety should will ways guide the amount of supervision that your student requires. Students are expected to work independently and consult you before finalizing patient care recommendations. Given that practice settings are varied, it is important for you to review your expectations with your student about what he/she can do under indirect supervision.

Prior to the Placement

To ensure a smooth start to the placement, we recommend you take some time to familiarize yourself with this guide, the student course syllabus; course objectives and activities, and the resource materials such as the preceptor quick reference guide; email to each preceptor prior to the placement.

- **Review of Student Information**

Recruitment occurs months prior to the start of the placement, so it is important that everyone is aware that the student is coming. Notification of match results will be distributed to you by email, via RxPreceptor. Students are required to post a Student Information Summary in MyCred; (an ePortfolio tool used in conjunction with RxPreceptor) one month prior to the start of their placement. This summary provides the preceptor with personal and professional information about their student.

- **Review of Assessments in RxPreceptor**

Take a look at the student assessments in RxPreceptor to gain a better understanding of the expected course competencies and behaviours demonstrated to meet learning objectives. This may assist you in planning activities and learning opportunities for your student.

- **Learning Plans**

Your student will create a Learning Plan and post it on MyCred at least 1 week prior to the start of the placement. In the Learning Plan, your student will identify a skill(s) and knowledge he/she plans to focus on during the placement. The Learning Plan will be finalized by you and your student at the Early Assessment of Student and Preceptor. During the placement, the plan must be updated by the student and discussed with you at midpoint and final assessment. The student must upload the completed learning plan to MyCred at the end of the placement.

1. Midpoint - your student will update his/her progress for each objective and if there are areas of “Needs Improvement” within their Performance Assessment that you completed, these should be added as learning objectives in their Learning Plans.
2. At the end of the placement – your student will update his/her Learning Plan indicating progress made and have you review to ensure that it includes items that you have discussed over the course of the placement.



TIP: For a more thorough list of orientation activities, please see [Appendix B: Orientation Checklist](#) and refer to the online resource, the University of British Columbia [Etips for Practice Education](#), module 1 - Setting the Stage



Alberta Netcare Portal

Students are introduced to Alberta Netcare during their first year of pharmacy and encouraged to use it during all placements. Students are provided with refresher sessions that provide hands on training, registration process review and privacy/security awareness. Alberta Netcare access is only authorized for the timeframe requested for the student placement at the pharmacy placement site

Netcare Setup for Community Sites

(Pharm 305, Pharm 426 and PharmD)

Please note: This also refers to Primary Care Networks (PCNs) and community-based LTC sites.

Netcare Registration Process – Preceptor Responsibilities

You or the site Access Administrator (AA) will receive the students' Netcare User Registration Form (URF) eForm from the student about 6 - 8 weeks before the start of the placement. You/site AA must ensure that the Site AA signs and faxes the URF eForm to the eHealth Support team a minimum of 6 weeks prior to the student placement start date. The fax number is located on the bottom of the eForm. (Community placements only)

Account Credentials and Remote Access Token (fob) Delivery

Netcare hard tokens are sent directly to the placement site as per the pharmacy site address that was entered on the eForm (NOTE: the student will then keep this hard token for the duration of the pharmacy program as the Netcare token is issued directly to the user, not the facility).

If the hard token was mailed and your student has not received it within 1 week of the placement starting, contact the AHS Remote Access team at 1-844-542-7876 for a status update. For login assistance or password resets, please call the Provincial Help Desk at 1-877-931-1638.

Deletion Process – Student and Preceptor Responsibilities (community pharmacy only)

At the end of the placement, students must complete the Netcare user registration eForm to delete their access from your facility (eForm found in RXpreceptor under the Documents Library). The AA must sign and fax to the ehealth support team.

Netcare Setup for Institutional Sites

AHS/Covenant Sites (Pharm 316, Pharm 428 and PharmD courses). Please note: This process also refers to AHS or Covenant-affiliated LTC sites.

Alberta Netcare registration is arranged by the student's assigned Alberta Health Services (AHS)/Covenant Health site prior to the student placement start date to ensure access for the student during the placement. The Netcare user registration for AHS/Covenant Health placements is the responsibility of the AHS/Covenant Health Pharmacy Manager.

For comprehensive directives and support desk information based on practice area and need, please [click here](#).

Supporting & Guiding Your Student

When your student arrives at your site, he/she will be full of anticipation and questions about what to expect. We recommend that you take some time on the first day to orient your student to the site, meet other staff members, and familiarize him/her with the site policies and procedures.

Meeting Course Objectives

The learning objectives for each course have been developed based on seven educational outcomes, with consideration given to the student's current level of knowledge based on their year in the program and are outlined in the course syllabus. . The activities and assignments reflect the objectives and are grouped under the educational outcome they address. To assist you in completing assessments, keep anecdotal records of your students' progress.

Providing Feedback for Learning

Regular, timely, and frequent feedback is the key to a successful placement. Feedback is best as a two-way discussion. These discussions can be used to reinforce positive behaviours, help improve patient care skills or can be corrective for inappropriate or incorrect behaviours. Feedback is an extension of the assessment process and can help eliminate any surprises in the student assessments.

Keep a record of all discussions you have with your student, any examples of written work in question, assessments, and any notes you write. Using a DAP (Data, Assessment, Plan) documentation note format is suggested. These notes should also be included in the midpoint and final evaluation

The [One Minute Preceptor](#) is a micro-skill model which encourages critical thinking in students and gives them insight into clinical reasoning skills. For more information on the One Minute Preceptor, please refer to the online resource, the University of British Columbia [Etips for Practice Education](#), Module 3 Enhancing Your Teaching Skills. See also [Appendix E: Preceptor Roles](#), which will help identify different roles as preceptor and how to implement such roles to provide feedback and support for learning.



TIP: For detailed information on providing feedback, please refer to the online resource developed by the University of British Columbia [Etips for Practice Education](#), – Module 5 Giving Feedback at. In addition, please attend our free preceptor workshop "[Setting you and your student up for success](#)".

Conflict Resolution

Although we strive to prepare our students for the placement, occasionally situations arise as a result of differences in expectations.

The Faculty has vast experience with various scenarios and can offer support and insight for any troublesome situation which may arise. Please feel free to contact your Faculty Liaison for guidance and support at any time. Often through discussion, a positive outcome is the result of early intervention.



TIP: For more information about conflict resolution, please refer to the online resource [UBC Etips for Practice Education](#), module 8 - Conflict Resolution

Faculty Responsibilities

Experiential Education at the Faculty of Pharmacy and Pharmaceutical Sciences is committed to helping you, the preceptor, and our students to ensure a successful experience for all. A list of the responsibilities of the Faculty has been organized chronologically: prior to the placement, during the placement and following the completion of the course.

Prior to the Placement

Prior to the Placement the Faculty will:

- Ensure that sites and preceptors meet the placement criteria
- Notify sites of placement dates, student names and email contacts via email and RXpreceptor
- Provide notification and access to the preceptor guide, a student course syllabus and other placement resources including a Preceptor Quick reference Guide.
- Assist you with designing placement activities to best match site strengths and course expectations
- Provide ongoing opportunities for preceptor [training, support and resources](#)
- Provide and coordinate [library access](#) for preceptors
- Assign [Preceptor Faculty Appointments](#) accordingly
- Provide students with an orientation for each placement
- Provide preceptors with course specific information sessions (teleconferences, Telehealth or podcasts)

During the Placement

During the Placement the Faculty will:

- Assist and support you with any questions you may have
- Monitor Early and Midpoint Student Performance Assessments to ensure the placement is proceeding in a positive manner
- Support challenging or struggling students as needed
- If you have a concerning or challenging situation, our Faculty Liaisons will provide you with the information and direction to proceed in the best interests of you and your student. (Please see sections pertaining to [Conflict Resolution](#) or [Struggling or At Risk Students](#))

After the Placement

Following the completion of the placement, the Faculty will:

- Utilize course feedback to inform program planning in subsequent years
- Provide feedback to preceptors as requested
- Facilitate recognition of preceptors – ACP Annual Publication of preceptor list
- Update experiential learning courses and activities to align with any curriculum changes

Assessment & Evaluation of Students

Online Assessment Completion in RXpreceptor

All student performance assessments will be completed and submitted online through RXpreceptor. It is suggested that you log into RXpreceptor at the beginning of the placement to view the assessments and become familiar with the criteria and timelines.

There is information regarding assessment completion sent to preceptors prior to the start of placement in the Preceptor Quick Reference Guide. Dr. Ken Cor, Director of Assessment, has developed a 23 minute video entitled "[Experiential Education Student Performance Assessments](#)" to assist you in understanding the following:

- how the educational assessments are designed
- the reasons behind certain design features of the assessment tools
- how the assessments should be completed

Student Assessment Requirements

Preceptors evaluate students three times throughout the placement; the Early Assessment of Student, Midpoint Student Performance Assessment and the Final Student Performance Assessment.

Rating Student Performance

You will provide an overall rating of the performance of your student for each outcome using the assessment scale below.

Exceeds an Acceptable Level of Performance – In general, select this rating if you <i>STRONGLY AGREE</i> that your student has demonstrated ALL or MOST behaviours associated with the outcome.
Meets an Acceptable Level of Performance - In general, select this rating if you <i>AGREE</i> or <i>SOMEWHAT AGREE</i> that the student has demonstrated ALL or MOST of the behaviours associated with this outcome.
Needs Improvement to Reach an Acceptable Level of Performance - In general, select this rating if you <i>SOMEWHAT AGREE</i> to <i>SOMEWHAT DISAGREE</i> that the student has demonstrated ALL or MOST of the behaviours associated with the outcome.
Not Meeting an Acceptable Level of Performance - In general, select this rating if you <i>DISAGREE</i> or <i>STRONGLY DISAGREE</i> that the student has demonstrated ALL or MOST of the behaviours associated with this outcome.
Unable to Rate at Midpoint - Apply this rating if you were unable to observe your student demonstrating MOST skills or behaviours associated with this outcome AT MIDPOINT but will likely be able to observe by the end of placement. <u>Selecting this rating will serve as a signal to pay special attention to these skills and behaviours between the midpoint and the final assessment.</u>
Not Applicable - This rating should be awarded when the outcome cannot be assessed within your practice setting.

- Evidence to support the assessment can be included in the comment boxes provided.
- Students are required to participate in the completion of the final evaluation and to discuss the ratings and final recommendations prior to form submission.
- **Once the evaluation has been completed students will have access to the final documents through RxPreceptor.**



Overview of Assessments and Evaluations

Document	Submission Timeframe	Purpose of Assessment
<u>EARLY ASSESSMENT</u> of Student & Preceptor	Following first week of placement	<ul style="list-style-type: none"> ● Identify and address concerns ● Promote feedback and discussion ● Promote positive start to the placement ● Initiate communication with the Faculty if there are concerns mentioned by either student or preceptor
Student Performance Assessments and Midpoint Confirmation <u>MIDPOINT</u>	Midpoint of placement	<ul style="list-style-type: none"> ● Assessment of behaviours and outcomes ● Communicate student progress ● Indicate areas for improvement ● Set learning goals and expectations for balance of placement
Student Performance Assessments and Placement Mark <u>FINAL</u>	End of placement	<ul style="list-style-type: none"> ● Assessment of learning outcomes ● Recommendation of placement mark (pass/fail)
Preceptor Evaluation of Course <u>POST-COURSE</u>	After student has left placement	Assessment of Faculty, administration and the course. Preceptor comments helpful in identifying changes needed to administration, processes and courses.

The skills and behaviours associated with each outcome define expectations for each placement. Preceptors base their overall rating for each outcome on how strongly they agree or disagree that the student has demonstrated a set of expected skills, behaviours and knowledge. For early experiences (after years 1 and 2), students have not completed courses in all therapeutic areas, so performance expectations are in accordance with their level of knowledge and expected ability. The need for preceptor supervision, where appropriate, is indicated to reflect this. Individual behaviours for each of the outcomes assessed are listed in the appendix of each [course syllabus](#). Preceptors must also provide comments to support their ratings for each area of assessment and must discuss their final recommendation with students prior to submitting.

Formative Assessments: Assessment for Learning

The purposes of the formative assessments are to support the provision of specific feedback to students that can be used to improve learning and to provide specific feedback to preceptors that can be used to help improve their ability to instruct and guide student learning.

Student Self-Assessments

Student Self-Assessments are completed at the midpoint and at the end of the placement. Students rate their perceived level of ability on the same outcomes that preceptors assess them on. Students are expected to review the early self-assessments with their preceptor. At midpoint students should identify the behavior, skills and knowledge that they need to focus on for the balance of the placement. Students should also provide written comments to support their ratings. Students must complete and submit the Midpoint Student Self-Assessment at least 1 day prior to the Midpoint Student Performance Assessment discussion to allow the preceptor to pre-review and compare ratings. It is important that students reflect on their learning at the end of the placement and complete a final self-assessment. The final self-assessment does not need to be submitted in advance for preceptor review, but students must come prepared to discuss their perceived performance with their preceptor and discuss any discrepancies.

Midpoint Student Performance Assessment

Students may receive grades of “Needs Improvement” at midpoint with the understanding that with more time, effort and practice the skills will be achieved. These ratings in combination with the midpoint student self-assessment serve as a basis for the preceptor to identify goals and expectations for the remainder of the placement. The preceptor includes these goals and expectations at the end of the midpoint assessment and discusses them with the student. Preceptors do not need to indicate a ‘pass’ at midpoint; this will only be required on the final evaluation.



If you and/or your student is concerned that a grade of **Meets an Acceptable Level of Performance** may not be possible by the end of the placement **it is vital that you award a grade of Not Meeting an Acceptable Level of Performance at the midpoint and that the Faculty Liaison be contacted immediately.** Your student is encouraged to contact their respective Undergraduate Experiential Student Coordinator.

Summative Assessment: Assessment of learning

The purpose of the summative assessment is to facilitate the final decision on the extent to which students have achieved the learning objectives for the course. There is one summative assessment at the end of Pharm 316, the Final Student Performance Assessment.

*****IMPORTANT*****

To provide a recommendation of “**PASS**” the preceptor must indicate the student has achieved a “**Meets an Acceptable Level of Performance**” on **ALL** outcomes across **ALL** assessment areas.

End of the Placement Assessments

Course evaluation assessments are used to provide summative evaluation of different aspects of course effectiveness. They are also used to identify problems that might arise when students or preceptors are not meeting expectations for participating in the course. You will be invited to complete a post course evaluation survey at the conclusion of the course, to provide valuable insights, suggestions or request a call-back from Experiential Education course facilitators.

Student Assessment of Preceptor and Site

Your student will be completing and submitting (in RXpreceptor) up to three assessments of you as outlined below. You are encouraged to review and discuss with your student.

#	Document	Submission Timeframe	Comments
1.	Early Assessment of Preceptor	First Friday of the placement	<ol style="list-style-type: none"> 1. Identify and address concerns 2. Promote feedback and discussion 3. Promote positive start to the placement 4. Initiate communication with the Faculty if there are concerns mentioned by either student or preceptor
2.	Student Evaluation of Preceptor	Midpoint of placement	<ol style="list-style-type: none"> 1. Promote feedback and discussion about placement thus far 2. Identify and discuss goals for balance of placement and mechanisms to achieve 3. Address concerns, if any
3.	Student Evaluation of Preceptor and Site	End of Placement	<ol style="list-style-type: none"> 2. Completed after student has left placement site 3. Allows students to provide feedback to faculty without influence from preceptor 4. Serves as a measure of quality assurance

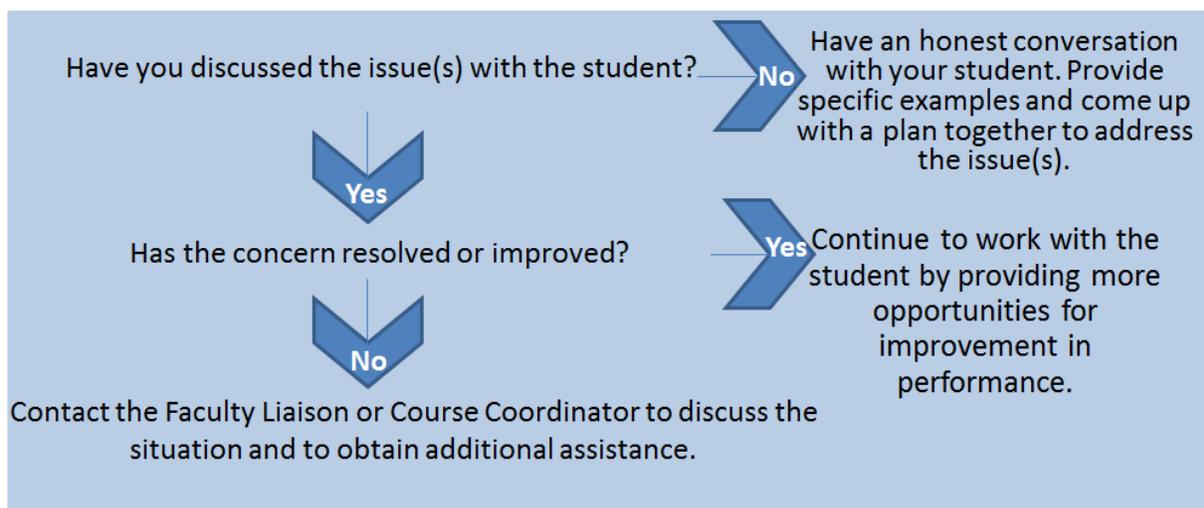


Struggling Students or Students at Risk of Failing

Most students will complete their placement without any problems; however we recognize that there may be exceptional situations where the student is not meeting the course objectives.

If your assessment of the student indicates **Needs Improvement to Reach an Acceptable Level of Performance**, continue to work with the student with a plan to address the areas. If no improvement is achieved in a timely fashion or the student is at risk of failing the course, the Faculty Liaison or PharmD Course Coordinator should be contacted.

Consider the student's performance as early as the first week of the course, and indicate your concerns on the Early Assessment Form. In the event that you are concerned about your student's performance, please refer to the following diagram and steps for direction.



Discuss the Concern with Your Student

As with any concerns you may have regarding your student's performance, it is best to discuss these first with the student. This can be done as part of the regular verbal feedback process which will enable you to involve the student in the discussion to provide his/her perspective. Provide specific examples that illustrate your concern. Written feedback can help you clarify your concerns and will provide documentation if the situation warrants it.

Some guiding questions to help direct the discussion with your student: ¹

- What did you notice about the student's performance? Be specific
- Why is it a problem?
- What are the consequences of the problem?
- Ask the student for clarification as to how they arrived at that action.
- How can the problem be resolved/dealt with?
- What behaviours or skills need to be learned or reinforced?
- How can the student avoid the same problem or alter his/her behaviour in the future?



Preceptor Resources, Training & Support

In addition to the resources and training, our faculty can answer any of your questions or point you in the right direction. At any stage of the placement, we encourage you to contact us for support. We are happy to field any questions you may have or provide assistance with any challenges or problems you may encounter. You can find a list of all Experiential Education Faculty including contact information in [Experiential Education Faculty](#) or you can call the Experiential Education Faculty office at 780-492-9780.

Overview of Preceptor Training Programs Available

Whether you are new to precepting or experienced, we have compiled and developed resources and training opportunities to support you in this important role.

Mandatory Training

Preceptors working in patient care environments are required to complete the [Patient Care Process Module](#). In order to standardize the Patient Care Process in the undergraduate curriculum, a unified patient care process has been developed to be used with each course. The Experiential Education team took it a step further and developed a series of short presentations to help you precept the various aspects of the Patient Care Process. These slide show presentations as well as the [Patient Care Process document](#) can also be found on our [website](#).

All preceptors are also required to participate in Level 1 Workshop, "Setting You and Your Student Up for Success" OR completed the web-based course: "University of British Columbia E-Tips for Practice Education":

[Experiential Education Live Preceptor Workshops](#) – We have developed two workshops that are currently being offered:

- **Setting You and Your Student Up for Success** - planning for the placement, setting expectations, assessment, evaluation and challenges/struggles
- **Precepting Your Student: Tailoring Supervision and Assessment** - levels and types of supervision, giving feedback, assessing the student's patient care process, and completing the student performance assessment (workshop 2).

[University of British Columbia E-Tips for Practice Education](#) – This web based course provides useful information about precepting, from the beginning of the placement to the end. It includes topics such as preparation for the placement, teaching skills, learning styles, feedback and assessment, conflict resolution and dealing with a struggling student.

Online Resources

Preceptor Course Overviews ([Pharm 305, 3165, 426, 428 & PharmD](#))

These overviews and/or brief podcasts provide general and course specific information for preceptors.

[Library Resources](#)

As a preceptor, you will be provided with library access to the University of Alberta Library for the duration of the placement. Visit our website at or contact Experiential Education Administrative Services at phexed@ualberta.ca to [apply for Library Access](#).



TIP: A complete [“how to” guide](#) has been prepared by the Pharmacy librarian. This guide contains links to important pharmacy information resources and provides step by step information on how to navigate the web page and use the resources.

[Dalhousie University Preceptor eLearning Course](#)

This web-based course provides additional useful information about precepting. It includes a video clip of a student perspective on Preceptorship, including the role of preceptor, important attributes of a preceptor, student expectations of his/her preceptor and even advice for preceptors.

Teaching Strategies: [ASHP Preceptor Tool Kit](#)

- The following are helpful articles on various topics
 - [The One Minute Preceptor: 5 Microskills for One-on-One Teaching](#)
 - [Teaching Clinical Problem Solving: A Preceptor's Guide](#)
 - [Setting Expectations](#)
 - [Dealing with the Difficult Learning Situation](#)
 - [The Effective Preceptor](#)
 - [Evaluation: Making It Work](#)
 -

Teaching Skills for Pharmacy Practice Educators

- The [Teaching Skills Handbook](#), prepared by the Office of Experiential Education, UBC, explores topics such as how we learn, preparing to teach, teaching with patients, observation, feedback

and assessment.

Advocacy Inquiry Video

- [This video](#) goes over facilitation and debriefing and is recommended for preceptors to view before attending the Faculty hosted workshops.

CSHP Webinar

1. [View Webinar](#) - *Sometimes, I Just Don't Know if I'm Getting Through-Principles of Framing & Delivering Effective Feedback for Pharmacy Residents*. You will need Windows Media Player 9 or higher to view the presentation, and you will also be required to enter your email address.

Program Policies & Procedures

Conflict of Interest – Preceptors and Placement Sites

Placements are NOT permitted at sites where a personal or financial relationship exists. If the site has various clinical areas with different preceptor staff, students are not permitted to be assigned to areas where they have a conflict. These relationships are defined below:

1. Personal relationships: friends, family (a person connected with another by blood relationship, marriage, conjugal relationship or adoption)
2. Financial relationships: pharmacy practice site or clinical practice area (at a large site) in which the student has received a wage in the past, where a student is currently employed, or where a student has a contract or promise for future employment

This policy is intended to avoid situations which could be perceived as potentially compromising an objective, candid and fair assessment of the student and to ensure the “learner: teacher” relationship is upheld. If preceptors become aware of a conflict they can also bring this to the attention of the Faculty.

Disclosure is the responsibility of the student and preceptor. Failure to disclose a potential conflict of interest may result in the student having to repeat the placement at an alternate site.

Attendance, Absenteeism and Punctuality

Illness

Attendance and completion of all hours is mandatory for credit to be received. In the case of illness, your student is expected to notify you as soon as possible, by way of a phone. Absences due to illness of two days or more require an explanation which may include evidence such as a physician’s note. Please contact the Faculty, in the event your student has missed more than 2 days due to illness.

Stat holidays

Should a statutory holiday fall within the timeframe of the placement, it is your discretion to decide how to proceed. You may grant the student the stat day off, a day off in lieu of the stat, or include that day as a placement day.

Pharm 426/428 (4th year community/institutional placements)

One day has also been allocated as discretionary for off-site student’ professional development activities, which would require your advance permission.

Flu clinics

Students can participate in the U of A on-campus flu clinics for a maximum of 1 day. The Faculty supports student participation in the clinics if it is feasible with regard to the placement schedule, and the travel distance to Edmonton is reasonable.

PharmD Seminars

PharmD seminars run concurrently with placements. It is mandatory that your student attends these seminars in person. These are excused absences.

Conferences

Undergraduate students may be absent from placements for up to 1 day during the program for professional related activities, such as a conference. PharmD students are allowed up to 3 days for professional related activities. These absences must be approved, prior to the activity, by both preceptor and the students' respective course coordinator.

Dress Code

Students are expected to dress in appropriate and professional attire that is clean, neat, and not overly worn. They must adhere to the dress code of the pharmacy or institution and are advised to check with you regarding site specific dress and hygiene/grooming policies (beards, piercings, and false or coloured finger nails).

If your site is a fragrance free environment, please notify the student of this policy as well as any site specific dress requirements prior to or at the beginning of the placement. Students should always wear Faculty of Pharmacy Identification.

Mobile Device Policy

At each site, the use of electronic devices is to be reviewed with the preceptor. If device use is sanctioned at the site, they are to be used with utmost discretion **for educational purposes only**. If directed by the preceptor, device may be used to contact the preceptor for experiential education related matters only.

Practicum Intervention Policy

The Dean, or delegate of the Dean, may immediately deny assignment of a student to, withdraw a student from, or vary terms, conditions or site of a practicum/clinical placement if the Dean or designate has reasonable grounds to believe that this is necessary because of public interest, public safety, or public health concerns. In making a decision to intervene by way of the [Practicum Intervention Policy](#), third parties may be consulted. The Dean's authority is balanced by the right of a student to appeal the Dean's decision to the Faculty Practice Review Committee and to the GFC Practice Review Board (PRB)

Professionalism

As ambassadors of the University of Alberta, all students are expected to follow the:

- [Code of Student Behaviour](#), specifically Section 30.3.3 – Inappropriate Behaviour in Professional Programs, as set forth by University Governance
- [Alberta College of Pharmacists Code of Ethics](#) to be "both competent and professional in all they do."
- [Alberta College of Pharmacists Standards of Practice](#)

Students are expected to conduct themselves in a professional manner during the placement and will be assessed on their professionalism. The professionalism outcome is positioned first in all Course Syllabi and assessments to indicate its significance during experiential placements.

The Faculty of Pharmacy and Pharmaceutical Sciences has **ZERO** tolerance for unprofessional behaviours. Significant lapses in professionalism will result in removal from the placement site.



TIP: You are encouraged to discuss expectations regarding attendance, dress code and professionalism with the student during orientation.

Policy on Student Safety

Bachelor of Science and PharmD in Pharmacy Students are not permitted to conduct patient/client home visits without their preceptor or designate present. Restricted activities must be performed under direct supervision, as per the health professions' regulatory authority.

As licensed practitioners, PharmD for Practicing Pharmacists students are legally permitted to conduct home care visits independent of a supervising preceptor. It is recommended that PharmD for Practicing Pharmacists students and their preceptors regard the following considerations prior to conducting an unsupervised home visit.

Any student issues or concerns about safety should be brought to the immediate attention of the primary preceptor/supervisor, and directly to the course coordinator / Faculty representative responsible for Experiential Education for the program of study.

Needle stick Incidents

If a student experiences a needle stick injury, **take immediate action:**

1. **Sharps injury**
 - Allow wound to bleed freely• Wash well with soap and water or alcohol based hand rub
 - Cover area with dry dressing
2. **Mucous membrane** (eyes, nose, mouth)
 - Flush area well with water for 5-10 minutes
3. **Skin Exposure**
 - Wash well with soap and water or alcohol based hand rub
4. **SEEK MEDICAL ATTENTION**
 - Go to your nearest walk in clinic, doctor's office or Emergency Department for assessment, blood work and treatment.
 - Ensure the source patient be tested, and request results be provided to your practitioner
5. **Report and Document**
 - Once first aid has been administered, report the incident immediately to supervisor/preceptor and source patient testing should be initiated.
 - The following reports need to be completed as soon as possible after the exposure:
 - a) Complete and submit the [University of Alberta Incident Report form](#)
 - b) Notify the [Workers' Compensation Board](#)
 - Students can refer to the U of A Environmental Health and Safety Website for the [Human Blood and Body Fluid Exposure \(HBBFE\) Flowchart](#) and [\(HBBFE\) Supplementary Information](#).
6. **Follow up** as required with the University Health Centre or a family physician

References

- Red Deer College/Alberta Health Services. Preparing to be a Preceptor: A handbook for health care aide preceptors. Red Deer: Red Deer College/Alberta Health Services; 2010.

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*Used with permission of the Dalhousie University Faculty of Health Professions Practice Education Committee.

- Practical Doc [Internet].Edmonton, Alberta, Canada: Government of Alberta; c2013. One Minute Preceptor; [cited 2013 July 3]; [1 screen]. Available from: <http://www.practicaldoc.ca/practical-prof/teaching-nuts-bolts/one-minute-preceptor/>

Appendices

[Appendix A](#): *Preceptor Responsibilities Checklist*

[Appendix B](#): *Orientation Checklist*

[Appendix C](#): *Pharmacy Care Plan Worksheet – with Checklist*

[Appendix D](#): *Preceptor Roles*

[Appendix E](#): *BScPharm On-Campus Curriculum Overview*

[Appendix F](#): *Pharmacist Preceptor Competencies & Performance Indicators*

Appendix A: Preceptor Responsibilities Checklists

Prior to the Placement

It is recommended that the planning process is started at least one month prior to the placement.

General

- Attend preceptor workshops, teleconferences or Telehealth sessions. Listen to online course podcasts or participate in online preceptor education modules (Please see Course Information, Training and Resources and Preceptor Workshops on our website at <http://pharm.ualberta.ca/preceptors> for more information and dates OR see **Section 6 – Preceptor Training and Resources**)
- Review the specific course manual, course objectives, activities and assignments (posted online and in RXpreceptor)
- Inform relevant team members that a student is coming and determine how they can contribute to the student's learning experience at your site.
- Brainstorm learning opportunities at your site and plan activities for your student that meet the objectives of the course and align with the student's interests
- Create schedule/calendar of activities for student. Please Note: Pharm 305, 426 and 428 have student activity and assessment schedules posted on the Faculty website as well as the manual that can be used as a template Prepare a student workspace if available (e.g., computer access)
- Provide student with the following information:
 - Your contact information
 - Location of pharmacy
 - Parking, transportation and accommodation (if relevant)
 - When and where to report on the first day
 - Site specific dress code requirements (e.g. lab coat, name tag)
 - Recommend any references the student should bring
 - Reminder to bring any required paperwork (e.g. criminal record check, immunization records, N95 fitting documentation)
 - Information regarding any special activity during the course e.g. staff social functions

Assessments and Evaluations

- Review evaluation and assessment tools provided that will be used online in RXpreceptor. (Samples can be found in the Course Syllabi).
- Be aware of the various expected assessments and timelines; i.e. early, midpoint and final.

RXpreceptor

- Ensure the primary preceptor is set up in RXpreceptor (Please see [Section 8.2.1: RXpreceptor Online Program Set-Up](#))
- Review student ePortfolio on MyCred posted by student on RXpreceptor, at least one month prior to the start of the placement. Please acknowledge receipt of this information to the student via email within one week of reviewing it. Determine your student's area of interest. You can let him/her know (when the placement begins) if he/she should expect a specific patient population. You can provide your student with required readings to prepare them for this placement.
- Sign up for library access (if not already established as part of the Clinical Academic Colleague faculty appointment) by completing the Preceptor Library Form in RXpreceptor (Click on the Documents Library tab)

Netcare

- Arrange for student's Netcare set up at your site - community placements only. (See [Section 8.6: Netcare](#))

MyCred

- Review student profile. Please acknowledge receipt of this information to the student within one week of receiving it.
- Review your student's Learning Plan posted here

During the Placement**General**

- In the first day/week, orient your student to the site and familiarize him/ her with the site policies and procedures
- Review the course learning objectives, activities and assignments with your student
- Discuss your expectations with your student and have your student discuss his/her expectations of the placement with you
- Be open to questions and feedback from your student³
- Debrief with you regarding feedback on their patient interactions, review patient care plans, and discuss student progress. Review outstanding activities and areas of focus.

Assessments and Evaluations

- Review your student's self-assessment on day one of the placement
- By end of first week complete Early Assessment of Student (completed by you)
- At end of first week, review and discuss Early Assessment of Preceptor (completed by student)
- By the end of the first week, assist your student in finalizing the Learning Plan.
- Discuss his/her schedule including learning activities, specific tasks, and the assessment process
- Review your student's evaluation of the Preceptor Assessment (midpoint) and Preceptor and Site Assessment (final) with your student.
- Observe your student regularly³
- Provide timely, constructive (corrective and supportive) feedback on a regular basis
- Keep detailed notes on your student's performance. It may be helpful to document using a DAP note format (Data Assessment, Plan) regarding any concerns of student performance.
- Complete the Student Performance Midpoint assessment including the midpoint confirmation (Pharm 305, 426, 428) at the Friday midpoint of the placement. Discuss the assessment, including the agreed upon learning goals stated in the midpoint confirmation with your student.¹
- Notify the Faculty Liaison in the event of any questions, issues, mark of **Not meeting an Acceptable Level of Performance** at midpoint, or concerns regarding lack of improvement

Complete the Student Performance Final Assessment, assign final placement mark and review with your student

After the Placement

- Complete the Preceptor Course Evaluation survey (link emailed post placement)

Netcare

Ensure Netcare access has been deleted (community placements only). Netcare Access is the Administrator's Responsibility.

Appendix B: Orientation Checklist

The first day of your student's placement can be filled with emotions from anxiety to excitement. The orientation helps to "set the stage" for the placement. Here are some suggestions to ease the transition for your student and ensure they are placement ready.

Professional Discussions

- Student profile and resume
- Preceptor's practice experience and interests
- Preceptors preferred method of contact
- Student/preceptor responsibilities and expectations
- Specific professional expectations – i.e. confidentiality, dress and appearance policies
- Pharmacy/Facility information regarding policies & procedures (i.e. patient & staff safety)
- Information regarding staff meetings, conferences, rounds, committees

Course Review

- Course manual (objectives and activities; include information regarding presentations, patient care, etc.)
- Assignments and course portfolio
- Assessment process (including feedback)
- Student self-assessment (student to submit (via RXpreceptor) to allow for discussion on day 1)
- Preliminary student schedule (pharm 305, 426 & 428 manuals have activity & evaluation schedules)

Pharmacy Practice

- Practice specialties and characteristics (include how student will be involved)
- Introduction to other healthcare professionals; in close proximity or in facility

Dispensary Orientation

- Arrangement of dispensary
- Storage of medications
- Location of equipment and supplies, use of fax & phones
- Prescription files or orders
- Documentation Record keeping (error log, study binders)
- Therapeutic references/library (include on-line resources)

Tour of Site/Facility

- Introduction to pharmacy staff and others (include their role & how they may be involved in the student's placement)
- Product/service areas (crutch or other rentals, blister packaging, counselling)
- Management, pharmacy offices
- Student workspace
- Emergency exits
- Staff room/cafeteria, storage room, lockers, washrooms, etc.

Technology

- Computer order entry, patient profiles, profile monitoring and documentation
- Equipment: telephone, fax and supplies, internet
- Security devices/system

Appendix C: Pharmacy Care Plan Worksheet – with Checklist for Assessment

MEDICAL CONDITION AND/OR DRPs	GOALS OF THERAPY	ALTERNATIVES	RECOMMENDATIONS/ PLAN	MONITORING PARAMETERS	FOLLOW-UP
<p>For each medical condition and/or DRP identified, create an integrated pharmacy care plan. List and prioritize each medical condition first, followed by any DRPs identified for a given condition. Although some medical conditions may not have a DRP, a care plan is still necessary for ongoing patient monitoring.</p> <p>DRP Categories: Indication: 1. Unnecessary drug therapy, 2. Needs additional Drug Therapy, Effectiveness: 3. Ineffective Drug, 4. Dosage too low, Safety: 5. Adverse Drug Reaction (includes drug interactions), 6. Dosage too high, Compliance: 7. Non-adherence/compliance.</p>	<p>For each medical condition and/or DRP state desired goals of therapy.</p> <p>Goals: cure, prevent, slow/stop progression, reduce/eliminate symptoms, normalize a lab value.</p> <p><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>Compare relevant drug and non-drug therapies that will produce desired goals. List the <u>pros</u> and <u>cons</u> of each therapy. <i>(Consider indication, efficacy, safety, adherence, and cost/coverage).</i></p>	<p>In collaboration with the patient and other providers, select the best alternative and implement the plan. Provide a rationale for the chosen plan.</p> <p><i>Consider:</i></p> <p><u>Drugs:</u> consider drug, formulation, route, dose, frequency, schedule, duration, medication management.</p> <p><u>Non-drug:</u> non-drug measures, education, patient referral.</p>	<p>Determine the parameters for monitoring the <u>efficacy</u> and <u>safety</u> for each therapy.</p> <p><i>(Consider clinical and laboratory parameters, the degree of change and the time frame).</i></p>	<p>Determine <u>who, how and when</u> follow-up will occur.</p>
<p><input type="radio"/> Are all medical conditions and DRPs identified (based on 4 areas of assessment - indication, efficacy, safety, medication organization/adherence)? <input type="radio"/> If no, discuss with student and probe to see if those missing can be determined.</p> <p><input type="radio"/> Are medical conditions/ DRPs prioritized in an acceptable manner?</p> <p><input type="radio"/> Is rationale provided or discussed for DRPs (based on either patient or provider data)?</p>	<p><input type="radio"/> Therapeutic goal/outcome(s) stated?</p> <p><input type="checkbox"/> Patient goal incorporated (if appropriate)</p>	<p><input type="radio"/> Is an assessment of each medical condition/DRP provided (factors considered to influence/determine a plan)?</p> <p><input type="checkbox"/> Are alternatives (with rationale for each) provided?</p>	<p><input type="radio"/> Plan/recommendations are outlined</p> <p>Includes:</p> <ul style="list-style-type: none"> <input type="radio"/> dosing considerations <input type="radio"/> patient preferences <p>ACTIONS TAKEN</p> <p><input type="radio"/> Appropriate/acceptable action has been taken</p>	<p><input type="radio"/> Monitoring plan present</p> <p>Includes:</p> <ul style="list-style-type: none"> <input type="radio"/> safety <input type="radio"/> efficacy <input type="radio"/> frequency <input type="radio"/> duration (if appropriate) <input type="radio"/> which healthcare provider will follow-up 	<p><input type="radio"/> Follow-up plan present</p> <p>Includes:</p> <ul style="list-style-type: none"> <input type="radio"/> who <input type="radio"/> how <input type="radio"/> when <p><input type="radio"/> includes outcome (if possible)</p>

Appendix D: PRECEPTOR ROLES

Preceptor Workshop February 2016 ¹

ASHP in collaboration with joint accrediting bodies developed a model for clinical teaching. This model describes the creative and flexible application of four major preceptor roles: (1) direct instruction, (2) modeling, (3) coaching, and (4) facilitating. The preceptor adapts his/her role depending on the student's stage of learning and progression in the placement.

Role	Description	When/how to use	Other
Direct Instruction	Readings, lectures, discussions Refer students to relevant resources & check understanding	To teach foundational content required to perform a skill Novice learners or beginning of a placement	Differs from classroom learning preceptor can place responsibility for content on the student. Use to verify learning later in a placement
Modeling	Demonstrating a process while thinking out loud	Used when learner has the appropriate background knowledge & is ready to begin learning to perform the skill	Student both observes behavior & hears the thought process
Coaching	Student performs the task while being observed & feedback is provided during the interaction. Student is encouraged to think out loud	Used when learner has knowledge & has observed the process. Fine tuning of a skill	Used until corrective feedback is no longer required Providing quality feedback is essential in this role Learner should be able to describe what to continue doing & how to improve
Facilitating	Learner performs the activity independently. The preceptor is available if required and debriefs	Learner has been coached Student & preceptor have confidence in ability	Preceptor can also use pre-brief to assess student's approach and preparedness

¹ AJHP Sept 15, 2102: 69: 1588-99

Application of Preceptor Roles

	Pharm 305	Pharm 316	Pharm 426/428	PP PharmD
Direct instruction	Orientation to new skills or tasks Fill knowledge gaps or translate knowledge to clinical scenario	Orientation to new skills or tasks Fill knowledge gaps or translate knowledge to clinical scenario	Fill knowledge gap when encountering unique populations, disease states Discussion can allow preceptor to verify student's base line knowledge	Fill knowledge gap when encountering unique populations, disease states Discussion can allow preceptor to verify student's base line knowledge
Modeling	Introducing new skills or contexts Sharing clinical reasoning and the wisdom of practice	Introducing new skills or contexts Sharing clinical reasoning and the wisdom of practice	Frequently starting role Clarifying expectations	Introducing new skill/new population Clarifying expectations
Coaching	Second half of the placement	Second half of the placement	<u>Primary role early in the placement</u> Skill development Verify students self-assessment of abilities; allows preceptor to determine student's level of performance	Early in the placement for fine tuning Verify students self-assessment of abilities; allows preceptor to determine student's level of performance
Facilitation	Rarely used for direct patient care activities	Rarely used for direct patient care activities May be used to challenge exemplary students for specific skills (i.e. perform a BPMH)	May be used for specific activities Used for simple cases to build independence and role definition	<u>Primary Preceptor Role</u> Increase use as the rotation progresses Start with less complex scenarios (increasing complexity it a way to challenge)

Appendix E: BScPharm On-Campus Curriculum Overview

The following table provides an overview of the courses, therapeutic modules, and practice skills taught in the undergraduate pharmacy curriculum. For therapeutic modules, a select sample of major topics covered is indicated.

Year	1 st Professional Year	2 nd Professional Year	3 rd Professional Year	4 th Professional Year
Classroom	<ol style="list-style-type: none"> 1. Medicinal Chemistry 2. Drug Information 3. Pharmaceutical Biotech and Immunology 4. Communications 5. Introduction to Patient Care Process 6. Critical appraisal of literature 7. Pharmaceutics (compounding) 8. Pharmacy Math 9. Dispensing Workflow <p>Therapeutic Modules</p> <ol style="list-style-type: none"> 10. Dermatology (warts, dermatitis, psoriasis, acne, perspiration, dry skin, drug-induced skin conditions, lice, scabies, minor cuts/wounds, sunburn, skin cancer, vitiligo) 11. Ear, Eye, Nose, Throat (allergic rhinitis, general ear conditions, otitis externa, ear wax impaction, complications affecting ear, glaucoma, macular degeneration, contact lens care) 	<ol style="list-style-type: none"> 1. Law and Ethics 2. Pharm Practice Research 3. Interdisciplinary Collaboration 4. Radiopharmacy 5. Pharmacokinetics <p>Therapeutic Modules</p> <ol style="list-style-type: none"> 6. Nutrition (vitamins & minerals, sports nutrition, obesity) 7. Hematology (anemia, anticoagulants, blood disorders) 8. GI and liver (GERD, PUD, N/V, IBS, cirrhosis, alcoholic liver disease) 9. Cardiology (HTN, CAD/ACS, dyslipidemia, heart failure, AFib, PVD) 10. Transplant (general principles, heart, lung, pancreas, kidney, liver) 11. Pulmonary (asthma, COPD) 12. Nephrology and Urology 13. Pain (opioids, NSAIDs, neuropathic agents) 	<ol style="list-style-type: none"> 1. Management 2. Provincial and Canadian healthcare <p>Therapeutic modules</p> <ol style="list-style-type: none"> 3. ID Part 1 (bacterial infections) 4. ID Part 2 (viral, fungal, parasitic infections, immunizations) 5. Neurology (Stroke, seizures, HA, movement disorders, neuropathies) 6. Bone and Joint (OA, RA, gout, osteoporosis) 7. Peds/Geriatrics (drug principles in peds/geri, falls, peds conditions (fever, GI, Reye's, resp infections, autism) 8. Oncology (select Ca & supportive care Tx) 9. Mental health (depression, bipolar, schizophrenia) 10. Endocrine (DM, thyroid, pituitary/adrenal) 11. Women's and Men's Health (contraception, menopause/andropause, pregnancy/lactation, sexual dysfunction) 	<ol style="list-style-type: none"> 1. Electives 2. Experiential clinical placements (8 weeks community practice, 8 weeks institutional practice)
Practice Skills	<p>Year one</p> <p>focus on professionalism and communication skills (patients, team)</p> <p>Patient-centered care and health assessment</p> <ul style="list-style-type: none"> - Medication/medical history - care plan creation and patient care process - Documentation - basic <p>Patient education</p> <ul style="list-style-type: none"> - Select EENT/derm products <p>Drug information & basic literature evaluation</p> <p>Dispensing/compounding</p>	<p>Build on year one</p> <p>Patient/health assessment</p> <ul style="list-style-type: none"> - Integrate with drug knowledge - Patient interview, physical assessment (BP and pulse); lab tests - Med history (reconciliation) - Allergy assessment - Emphasis on care plan <p>Pt education & oral patient presentation</p> <p>Intro to research design & EBM</p> <p>Documentation</p> <ul style="list-style-type: none"> - Medical chart; care plans <p>Inter-professional practice</p>	<p>Build on year two</p> <p>Patient/health assessment</p> <ul style="list-style-type: none"> - Clinical judgment & prioritization required - Patient goal setting / motivational interviewing / patient self-empowerment - Health promotion, disease prevention <p>Therapeutic Drug Monitoring</p> <p>Injection training (immunizations)</p> <p>Management (service proposal/implementation)</p>	<p>Build on years 1-3, Integrate knowledge/skills in practice</p> <p>Patient/health assessment through experiential learning & specialized electives</p> <ul style="list-style-type: none"> - Graduated independent decision-making for planning care - Application / analysis

Appendix F: Pharmacist Preceptor Competencies & Performance Indicators

At the 2007 PEP-Canada AFPC annual meeting, a list of desired qualities of a preceptor was created. This list was intended to guide preceptor selection & self-assessment of readiness to precept. The CanExEd Project for Pharmacy revisited this list of qualities in its aim to bring a national approach to preceptor development. Primary and grey literature from pharmacy, medicine, nursing & education highlighting competencies or qualities of effective teachers was reviewed. Each resource identified 6-11 competencies and supporting indicators or attributes. A list of competencies or qualities from each source was extracted and compared to the PEP-C list of desired qualities of a preceptor. Recurring, overlapping and additional themes were identified. Based on the analysis, a proposed list of pharmacist preceptor competencies & performance indicators was created. The AFPC Educational Outcomes for First Professional Degree, NAPRA Competencies for Pharmacists at Entry to Practice and CIHC National Interprofessional Competency framework were reviewed and compared to this list to verify consistency. This list could serve as a foundation for a preceptor development program and preceptor self-assessment tools.

PEP-C 2007	Proposed Competencies 2015	Proposed Performance Indicators 2015
Possess a commitment to teaching	<ul style="list-style-type: none"> Demonstrate a commitment to teaching as a means for growth & skill development for each learner 	<ul style="list-style-type: none"> Inspires & motivates learners to develop patient centered services Adheres to ethical principles in teaching, demonstrating compassion & integrity Invests in each learners growth & skill development Teaches by example Designs placement activities to meet course goals & objectives Engages in activities to continually develop teaching skills
Able to build good rapport & relationships with patient and health care team	<ul style="list-style-type: none"> Create practice-based learning opportunities by promoting active collaboration in client care 	<ul style="list-style-type: none"> Aware of placement goals & objectives & plans activities to meet them Promotes student participation at rounds, team meetings, and conferences. Promotes collaboration and teamwork between student pharmacist, team members & patients Provides learners with graduated responsibility based on their abilities Provides learners the opportunity to learn with, from & about the roles and responsibilities of other health professionals

PEP-C 2007	Proposed Competencies 2015	Proposed Performance Indicators 2015
Open to learning with the student	<ul style="list-style-type: none"> Engage in continuous reflection, self-assessment & lifelong learning to improve their effectiveness as educators (Continuing Professional Development) 	<ul style="list-style-type: none"> Seeks feedback to identify strengths & limitations in teaching competence Reflect on one's own teaching & practice routinely Evaluate the outcomes of their teaching Develops personal educational goals based on reflection & self-assessment & implements a plan to achieve those goals
Demonstrates good communication skills	<ul style="list-style-type: none"> Demonstrate effective communication skills 	<ul style="list-style-type: none"> Communicates expectations, goals & information in ways that stimulate & engage learners Exhibits excellent interpersonal skills in interprofessional teams Promotes continuity of student support & supervision through communication Constructively addresses conflicts or disagreements
Able to create positive relationships with students	<ul style="list-style-type: none"> Create professional relationships with students 	<ul style="list-style-type: none"> Demonstrates respect for each learner Demonstrates a caring attitude towards student pharmacists (i.e. gets to know the student goals) Accessible to student pharmacists Open to alternative approaches to solve problems & issues Creates an environment that facilitates learning
Flexible and able to adapt to students' learning needs	<ul style="list-style-type: none"> Adapt to students' learning needs 	<ul style="list-style-type: none"> Considers how individual students learn (i.e. learning styles) Determines each learner's prior knowledge & skills (strengths & barriers) Utilizes educational techniques that are appropriate for the student &/or content Provide sufficient practice opportunities to address both course objectives & student's learning needs
Help student(s) transition from classroom to practice setting	<ul style="list-style-type: none"> Model best educational & clinical practices to facilitate development of skills 	<ul style="list-style-type: none"> Keeps up-to-date on educational practices & resources within their field of expertise Provide adequate demonstration & coaching of skills Break complex concepts & skills into separate steps Models professional practice standards in their field Demonstrates effective collaboration within practice

PEP-C 2007	Proposed Competencies 2015	Proposed Performance Indicators 2015
		environment
	<ul style="list-style-type: none"> Facilitate student development of critical thinking, problem solving & decision making skills 	<ul style="list-style-type: none"> Use open-ended questions to promote learning Encourage student to question practice & evaluate care provided Engage in reflection with student to link theory to practice Problem solve in a social context Explore the student's assumptions, values, feelings, and perspectives that influence understanding of experiences and actions
	<ul style="list-style-type: none"> Assess & document student pharmacist performance 	<ul style="list-style-type: none"> Assess learners progress in acquiring knowledge skills & attitudes Gives specific, timely and balanced feedback that identifies strengths & areas of improvement Adjust supervision & responsibility based on student's abilities Document student progress & performance assessments in placement records

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