



## **Marshfield Clinic Pharmacy Residency Preceptor Guide**

*Postgraduate Year One (PGY-1)*

### **Program Purpose**

- Prepare the resident for a clinical pharmacist and/or leadership role in an integrated healthcare delivery system, adjunct faculty position, or PGY-2 training in area of choice

### **Program Educational Outcomes**

- Manage and improve the medication-use process
- Provide evidence-based, patient-centered medication therapy management with interdisciplinary teams
- Exercise leadership and practice management skills
- Demonstrate project management/research skills
- Provide medication and practice-related education/ training
- Utilize medical informatics

## **Resident Orientation to Each Learning Experience**

**Each Learning Experience (e.g., rotation) should have a binder of information describing it. Here is an outline of what to include in the binder**

- Copy of Learning Description
- Copy of objectives that will be taught (T) and/or evaluated (TE)
- Required Activities during the learning experience
- List of potential topic discussions
- Required readings

**Orientation should occur at the beginning of the learning experience, including the following topics:**

- Introductions (e.g., preceptor, other staff)
- Goals with associated objectives for learning experience (e.g., activities that will support each goal, daily requirements, specific activities/projects)
- Resident review (e.g., strengths and weaknesses, goals, previous experience, specific interest areas)
- Scheduling (e.g., hours/schedule, calendar with deadlines)
- Logistics (e.g., parking, dress code, personal item storage, restrooms)
- Introduction to work area (e.g., review of pharmacy layout and workflow, computer system(s) and expectations, documentation system)
- Legal and regulatory issues (e.g., HIPAA)
- How preceptor will evaluate the resident and how the resident will be trained for self-evaluation skills

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## **Precepting the Learning Experience**

### **Core Standards of Pharmacy Residency Preceptors**

- Provide the resident with clear and complete description of rotation goals, objectives, and expectations.
- Review resident's goals for the rotation at the start of the learning experience.
- Clarify the amount of time the resident is expected to devote to the rotation.
- Clarify the priorities of daily activities.
- Indicate to the resident the days/times when you will not be available and assign a contact person when you are not available during Clinic hours.
- Establish a list of topics for the rotation. Readings for these topics may be assigned or the preceptor may ask the resident to select the references. If discussion of the topic is needed, this should be communicated and scheduled with the resident and preceptor.
- Clarify for the resident when it is necessary to contact other pharmacists before making recommendations to physicians or other health care providers.
- Meet with the resident on an ongoing basis for a discussion of patients, projects, topics, and to provider performance feedback.
- Complete evaluations as recommended (see evaluation and feedback).
- On rotations, the preceptor will have the resident present any required presentations, journal clubs or projects before the start of the next rotation.

**Eight tasks to help facilitate learning**

1. Discuss goals and expectations with the learner (*Have an orientation*)
2. Create a supportive learning environment (*Show enthusiasm for the subject matter and for teaching, Give specific positive feedback*)
3. Motivate the learner (*Select tasks where learners can succeed at new skills*)
4. Help the learner identify what is important in the situation
5. Use questions to stimulate memory and previous learning
6. Supervise active practice and hands-on experiences
7. Generalize to the broader learning process (*Use ‘what if’ problems to extend beyond cases seen*)
8. Provide ongoing feedback and promote self-assessment (*Give prompt and constructive feedback to enhance growth*)

**Short on Time? Try the ‘One-Minute Preceptor’ Model**

1. Get a commitment (Ask: What is going on?)→
2. Probe for evidence (Ask: Why?) →
3. Teach one general point→
4. Reinforce positive behaviors→
5. Correct errors and make recommendations →
6. Conclude with a plan

**The Four Roles of the Preceptor in Teaching Problem-Solving Skills**

Select appropriate strategy, method, and technique to correspond to resident’s learning needs

Preceptor Role	Technique
<b>Direct Instruction</b>	Direct learners to content specific to their practice problems
	Teach how a new piece of content relates to other pieces
	Introduce new content in the context of solving a direct patient care practice problem.
<b>Modeling</b>	Teach strategies to help clarify problems
	Teach the patterns that characterize different categories of direct patient care practice problems.
	Explain out loud what you are thinking as you solve a problem.
<b>Coaching</b>	Give learners opportunities to practice solving direct patient care practice problems coupled with feedback on their use of strategies
	Provide sufficient problem-solving practice to build speed
	Ask learners to explain out loud what they are thinking as they solve a problem.
<b>Facilitating</b>	Teach learners to evaluate their own work

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**Evaluation and Feedback**

**Conversation Openers for Providing Feedback to Learners**

- What are your thoughts about your interaction with \_\_\_\_\_?
- What was your rationale for suggesting [treatment/course of action] to this patient?
- What was the most challenging experience that you had today? What, if anything, could have been done to improve this situation?
- Can you describe one activity or patient interaction that you performed today that made you feel proud?

**Criteria for effective feedback:**

1. As specific as possible in terms of behaviors performed
2. Understandable by the learner (e.g., are you making “suggestions” or mandating actions; do they understand your points?)
3. Focused on the few most important things that need to be changed
4. Timely (scheduled on regular basis; ASAP after a problem)
5. At an appropriate time in a location out of public hearing
6. Positive whenever possible, but only when deserved
7. Not personally demeaning when critical
8. Designed to help the learner to develop and improve

## Model for Giving Constructive Feedback

Preparation: Observe performance. Plan issues. Find time/place.

- “Is this a convenient time for me to give you some feedback...?”
- “Let’s talk about ...(situation/setting/case)”
- “How do you think it went?” (**Listen to self-assessment**)
- “You did a great job on ...” (**Give specific examples of strengths**)
- “And you could do a better job on ...” (**Cite weaknesses, no “but”**)
- “Next time, I would like you to try...” (**give helpful ideas.**)
- “Could you summarize the main ideas from our discussion?” (**Check for understanding**)
- “Let’s meet again...Keep working on...” (**Closure for session**)

## What are Outcomes, Goals, Objectives, and Instructional Objectives?

- Educational **Outcomes** are statements of broad categories of the residency graduates’ capabilities.
- Educational **Goals** listed under each educational outcome are broad sweeping statements of abilities.
- Educational **Objectives (OBJ)**: resident achievement of educational goals is determined by assessment of the resident’s ability to perform the associated educational objectives below each educational goal.
- Instructional Objectives (**IO**): Offered as a resource for preceptors encountering difficulty in helping residents achieve a particular educational objective. Instructional Objectives are *teaching tools* only.

## Preceptor Evaluation of the Resident:

- Do end-of-learning experience summative evaluations (quarterly for longitudinal)
- Must include assessment of each goal and objective assigned to the learning experience
- Preceptor must discuss with the resident
- Monitor and facilitate growth in resident self-assessment skills (Resident completes self-assessment and assessment of preceptor and learning experience)
- Preceptor, resident and program director must sign
- Formative evaluation (e.g., Snapshots) can be applied to a variety of experiences where written, specific feedback can be used to help improve the resident’s performance (generated in ResiTrak™). In particular, Snapshots are helpful when verbal feedback is proving to be ineffective. It is also helpful to do a Snapshot at the midpoint of the rotation.
- Provide regular, day-to-day, criteria-based feedback to give the resident information on which to shape his or her task performance.

## Marshfield Clinic Pharmacy Resident ResiTrak™ evaluation scale:

- **(3) Exceeds expectations:** Fully accomplished the ability to perform the educational goal or the objective. No further instruction or evaluation is required
- **(2) Meets Expectations:** Progress Achievement requires skill development during more than one learning experience. In the current learning experience the resident has progressed at the required rate to attain full ability by end of the program
- **(1) Does not meet expectations:** Residents level of skill on the goal or objective does not meet the preceptor’s standards of either ‘Achieved’ or ‘satisfactory progress’

## Preceptor Development Opportunities (Page 1)

**Program:** Marshfield Clinic pharmacy residency preceptors must participate in an instructional program specifically related to teaching on an annual basis (equivalent to 2 hours of CE) during the residency year. Development tools that do not offer CE credit are also acceptable. See sample options below (e.g., computer based training, conferences/course, readings related to teaching). Your individual plan will be discussed at biannual quality improvement meetings with the program director. Incorporation of the Continuing Professional Development (CPD) model is encouraged.

This one hour biannual meeting will include discussion of the following:

- Review of Learning Description/ Matching Learning Activities with Objectives
- Review of evaluations/Program Director evaluation of preceptor
- Preceptor Development
- Balance of Work Time/Teaching

### Sample Opportunities

#### A. Computer Based Training

##### 1) Drake University: Preceptor Development Modules (CE program)

<http://www.theceinstitute.org>

###### \* Preceptor Development- Core Requirements (2 hr CE)

- College Mission and Assessment Tools/ Role of the Preceptor/ Developing your rotation/ Giving Experiential Students Constructive Feedback

###### \* Developing and Implementing an Introductory Pharmacy Practice Experience (1 hr CE)

(Select 'Register' next to the program titled "Preceptor Development Core Requirements". When prompted to pay, enter the prepaid code TEACH (all caps) to register at no charge)

##### 2) Pharmacist's Letter Preceptor Training CE (under Preceptor Home)

[www.pharmacistletter.com](http://www.pharmacistletter.com)

- Part 1: Teaching and Mentoring Advanced Practice Experience Students (1 hr CE)
- Part 2: Developing Challenging Student Activities and Assignments (1 hr CE)
- Part 3: Incorporating Students into the Development and Implementation of Pharmacy Services (1 hr CE)

##### 3) The Community Pharmacist Preceptor Education Program developed by APhA and NACDS (3 hrs CE)

1. Go to [www.nacdsfoundation.org](http://www.nacdsfoundation.org) and click on "CE Center." Click the "Register" link on the top left of the page. Fill out the registration form completely.
2. Click the "Submit" button at the bottom of the page to complete your registration. Click the "Distance CE" link and then click "The Community Pharmacist Preceptor Education Program" link. Click on "Enroll in this Distance CE." Follow the online instructions, complete the online assessment and evaluations, and receive your Statement of Credit.

##### 4) UW-Madison Clinical Instructor Training

###### 1. Creating a High-Performing Teaching Team (1 hr CE)

<http://ce.pharmacy.wisc.edu/courseinfo/Module1>

###### 2. Preparing Your Rotation Curriculum: Writing Objectives, Creating Activities and Mapping the Block (1 hr CE) <http://ce.pharmacy.wisc.edu/courseinfo/Module2>

###### 3. Orientation (1 hr CE) <http://ce.pharmacy.wisc.edu/courseinfo/Module3>

## Preceptor Development Opportunities (Page 2)

### B. Conferences/Courses

#### 1) ASHP Residency Learning System (RLS) Workshops

RLS is a way of thinking about training in pharmacy residencies based on systems thinking.

- ASHP National Residency Preceptors Conference: Offered every other year in Washington D.C. (e.g., August 2008, 2010)
- ASHP Clinical Midyear Meeting: Offered every year (December)
- [www.ashp.org/meetings/preceptors](http://www.ashp.org/meetings/preceptors)

#### 2) MEDAL-T- Art and Science of Teaching Faculty Development program

- Offered through UW-Madison School of Medicine and Public Health
- Takes place one afternoon per month September through May
- Purpose is to enhance teaching and educational leadership skills
- <http://www.med.wisc.edu/admin/medal/index.php>

#### 3) Great Lakes Residency Conference at Purdue University

- Preceptor Development Pre-Conference Workshops (Annually in April)
- [http://www.glprc.com/preconference\\_workshops.htm](http://www.glprc.com/preconference_workshops.htm)

#### 4) Other National Meetings (e.g., ACCP)

### C. Readings related to Teaching

- ASHP Website Residency Learning System (RLS) at [http://www.ashp.org/s\\_ashp/cat1c.asp?CID=3590&DID=5725](http://www.ashp.org/s_ashp/cat1c.asp?CID=3590&DID=5725)
- Teaching and Learning Resources from American College of Clinical Pharmacy (ACCP) at <http://www.accp.com/strteach.php>
- Preceptor's Handbook for Pharmacists (Sara Griesbach has a copy you can borrow)
- 'Director's Chair' Quarterly Newsletter from Dr. Erik Stratman
- UW-Madison VideoConference Journal Club: First Tuesday of the Month 7:30
- Readings Saved H:Drive/PharmacyResidency/PreceptorDevelopment

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#### Additional Resources

- **Program Director:** Sara Griesbach, PharmD, BCPS  
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- **Program Mentors:** Connie Folz, Jennifer Grimm
- **Marshfield Clinic Division of Education:** Erik Stratman, MD; Joseph Kilsdonk, Kerri Weister
- **Pharmacy Residency Website:**  
<http://www.marshfieldclinic.org/students/pages/default.aspx?page=postgradpharmacy>
- **ASHP Accreditation standards:** [http://www.ashp.org/s\\_ashp/cat1c.asp?CID=3531&DID=5558](http://www.ashp.org/s_ashp/cat1c.asp?CID=3531&DID=5558)
- **ResiTrak™ evaluation tool:** <http://resitrak.mccreadiegroup.com/resitrak/login.aspx>

#### References

- ACCP; ASHP; APhA; Pharmacist's Letter; Craig Gjerde, PhD UW-Madison MEDAL-T Course

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