CHECKLIST FOR PRECEPTORS

Preparing for the rotation

- ☐ Decide what you wish the student to learn over the course of the rotation. Example considerations:
    - Common disease states seen
    - Commonly used drugs
    - Drug for which cost containment is an issue
    - Medication reconciliation
    - Formulary issues
    - Provide education needs
    - Patient/medication safety issues
    - Regulatory requirements
    - Quality improvement opportunities
- ☐ Decide to what degree your rotation is flexible around the learning desires of the student
- ☐ Write rotation objectives (gain team consensus if applicable)
- ☐ Design a pre-rotation assessment of student ability/needs that can be completed at the beginning of the rotation to guide approach. Can also be used to track progress during the rotation, or at the end
- ☐ Decide if there is any examination component to the rotation
- ☐ Document your expectations, consider for example:
    - Hours
    - Communication
    - Attire
    - Degree of autonomy
    - Documentation – in chart, of interventions, formulary, etc
    - Projects
    - Number of patients and what an ideal student would be expected to do
    - Meeting attendance
    - Lunch
    - Site-specific policies that must be followed (for example, cell phone use)
- ☐ Identify any required readings for the rotation
- ☐ Identify any topic discussions for the rotation
- ☐ Compile list of projects that student can work on during rotation that will help the department, and provide student with productive work to do in-between patient care activities (engaging the help of the department can help gain "buy-in")
- ☐ Identify any learning opportunities with others (watching a surgery, rounding with an RN, visiting a clinic, etc)
- ☐ Work out the logistics of any preceptor handoffs (schedule changes, vacation, etc)
- ☐ Communicate with nursing, physicians and other health care professions that will be interacting with your students & seek collaboration opportunities
- ☐ Familiarize self with student assessment tools and design any feedback forms to be provided by other staff, physicians, etc..

- ☐ OPTIONAL- Design the syllabus for the rotation
- ☐ OPTIONAL- Design pre rotation survey to capture any needed information from the student, personal learning objectives, etc

Before the rotation:

- ☐ Send out a pre-rotation packet to the student, including:
    - Any required forms that need to be completed ahead of time
    - Training that must be completed prior to the start of the rotation
    - Orientation description
    - Map of how to get to site, public transport or parking instructions
    - Recommended resources or readings
    - Pre rotation survey (prior experiences and current learning desires of student)
    - Request copy of student CV
- ☐ Request computer access
- ☐ Arrange any needed preceptor cross coverage
- ☐ Put together an up to date list of protocols, readings, formulary, procedures, antibiograms, intervention documentation forms etc. that will help the student perform in-line with the department
- ☐ Let the pharmacy department/staff/nursing unit/providers know the rotation schedule and who they should expect, when
- ☐ Explain to the department/staff what type of rotation the student will be doing and how this differs from any other rotation types preceptored at your site
- ☐ Attain agreement for any technicians, pharmacists, etc who will be training the student and supply rotation objectives and student evaluation criteria
- ☐ Send out notification to other providers that will be involved with the students' learning; also provide the feedback forms with deadlines for completion

During the rotation

- ☐ Orientation
    - Review syllabus
    - Rotation requirements and expectations
    - Communication preferences
    - Evaluation/review schedule
    - Storage of personal possessions
    - Layout of facility, "glossary of terms" used in the facility, bed numbers per unit, etc
    - Tour
    - Describe where you expect the student should be performing by the mid-point, and final assessments
- ☐ Pre-rotation assessment (snapshot exam of where the student is at so you know how to adjust needs)
- ☐ Schedule – daily, weekly, any required meetings. etc
- ☐ Meet/touch base with student daily and agree how to communicate with you during the day

- ☐ Evaluations – explain the schedule, and what is measured/included (may be more frequent at the beginning of a rotation, or at the beginning of the academic year)
- ☐ Obtain feedback from others involved with the student rotation
- ☐ Patient load – titrate up as student is able to take on more concurrent patients
- ☐ Conduct at mid-point and final assessments of the student (using tools provided). It may be useful to do a first week assessment as routine, and establish if student needs more oversight than anticipated initially
- ☐ Advise university program of any concerns related to student performance as early as possible

After the rotation

- ☐ Self reflection – what worked well or otherwise from your perspective
- ☐ Seek feedback from department/other providers about what worked well versus what improvements are desired
- ☐ Update rotation requirements as necessary
- ☐ Provide any desired feedback to the university program
- ☐ If you are precepting one student per rotation, consider possibility of taking two concomitant students (may provide students with useful learning opportunities from each other with little additional work on your part)
- ☐ If you are precepting learners at different educational stages, consider how each can benefit from interaction with the other (can you mentor a Resident learning to precept a student, for example; or an APPE student helping an IPPE student, etc).