

PRECEPTING SERIES:  
**Navigating a  
 Virtual Rotation**

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Since Coronavirus Disease 2019 (COVID-19) hit Wisconsin in March 2020, precepting learners has changed dramatically.

Pre-COVID-19, pharmacists worked alongside learners and were able to model, coach, and facilitate behaviors and learning in person. But now, given the restrictions in health care facilities and social distancing requirements, pharmacists have had to evolve their teaching style to incorporate virtual precepting.

Planning these virtual or socially distant rotations for learners is more important than ever to ensure learners receive strong experiences. Reviewing and strengthening rotation planning steps, activities, evaluation, and contingency planning helps ensure that experiential learning remains valuable to learners.

## Pre-rotation

Any rotation should have a pre-rotation or kickoff meeting where general orientation for the learner to the rotation experience is completed. Here are some additional considerations to add to your pre-rotation checklist when accounting for virtual precepting and social distancing:

### *How do I keep my learner safe?*

- Will my learner receive personal protective equipment from the health care facility, or do they need to plan to bring their own?
- Are learners allowed to enter patient rooms? If so, under what restrictions?

### *Where will you plan to have your student work?*

- Does this space keep social distancing in mind?
- Is there a workstation or laptop for my learner to use?
- Can remote access to the electronic medical record (EMR) be provisioned for this learner?
- If my learner is going to be working remotely, how do I keep the learner actively engaged in patient care?
- Do we need scheduled touch-base meetings throughout the day?

### *What activities are required for the rotation?*

- What required activities need to be completed on-site?
- How can we plan for required on-

site activities to be completed as soon as possible in case the student or preceptor is sick or regulations around whether learners can be in the health care setting change?

## Student Contingency Planning

In the current climate, preceptors should expect that restrictions and guidelines will change during the duration of a rotation. Thinking ahead about how to adjust or react as a primary or co-preceptor can help reduce anxiety. The guidance in this section is geared towards school of pharmacy student learners. Resident learners typically fall under the institutional policies as employees. Some of the possible scenarios for student contingency planning to consider are listed below:

### *My student was notified that they were in contact with someone who has tested positive for COVID-19.*

- Tell the student not to come to rotation until cleared to return to work by a health care provider. Also be sure to review your school of

pharmacy policies as well as those from the health care institution.

- » If symptomatic, students should seek immediate testing as directed by their school of pharmacy.
- » Keep in mind that the symptoms of COVID-19 are very non-specific and even minor congestion and fatigue are considered symptoms that can qualify you for testing.
- » If asymptomatic, students should defer to their school of pharmacy for guidance or the local department of health.
  - Currently in Madison, if asymptomatic, anyone can receive free testing at the Alliant Energy Center. The downside of this approach is that the result takes longer to come back. Also, a negative test result does not mean the person tested is not contagious if the exposure was recent.

#### ***My student has tested positive for COVID-19.***

- Tell student not to return to rotation until cleared by their medical provider and to quarantine in their home as per the local department of health, school, and health care facility instruction.
- If the student feels well enough to continue to work, consider offering your rotation fully virtually if the learner has remote EMR access or the ability to complete make-up activities or projects.

#### ***My institution has stopped allowing students on-site.***

- If you have already started the rotation and you can complete it fully virtually, try to complete the rotation with exclusively virtual precepting and learning.
- If the rotation has not yet started, consider offering a fully virtual rotation if able.
- If you find you can no longer accommodate the student learner, inform the school of pharmacy as soon as possible so alternative arrangements can be made.

## **During Rotation**

There are many similarities between virtual precepting and in-person precepting. One similarity is the importance of reviewing the rotation schedule and establishing clear expectations early in the learning experience. Reviewing schedules and establishing expectations is even more important than usual since there might be few opportunities, if any, to touch base in-person regarding progress towards goals. Consider using a virtual meeting platform for video conferencing with functional audio and video so you and the learner can see each other's faces. Video meetings can help build rapport, ensure understanding by observation of visual cues, and help preceptors assess professionalism. Consider having a formal live video orientation on the first day of the rotation, if not prior to the start of rotation, to discuss items not unique to virtual precepting:

- Learning style preferred by learner
- Required learning activities
- Learner and preceptor schedules
- Rotation and learner expectations

An orientation meeting is also the perfect time to test technology and ensure adequate access to all required programs. Whenever possible, use a checklist to ensure you are not missing steps. One important checklist item is ensuring that offline contact information is exchanged to help with contingency planning.

Setting expectations becomes more critical to the success of a learning experience when you will not be located in the same physical space. Consider the following when setting expectations for a virtual rotation:

- Reach out prior to a learning experience to determine roles, responsibilities, and daily workflow.
- Communicate about any consistent time slots where you might be less available to the learner, such as daily meetings or rounds.
- Set clear expectations for when patient care notes should be completed, and which patients will be reviewed with the preceptor.

There will be less opportunity to observe learner performance directly.

Clearly communicating expectations can help ensure mutual understanding between preceptor and learner. Video conferencing might not be available, and thereby, verbal communication skills become that much more important for building rapport and precepting remotely. Consider the following when communicating with learners in a virtual environment:

- Remember simple pleasantries: "How is your day going?" "How was your weekend?"
- Use virtual video meeting platform (e.g. WebEx, Zoom, Skype) and lead by example by having your video turned on during discussions whenever possible. Live video is especially important if more constructive feedback is given.
- Discuss baseline understanding and competencies for both rotation objectives and technology requirements.
- Use screen-sharing capabilities as able.
- Be clear with wording and directions: "Left click on the notes tab on the bottom banner of your screen. Left click on new note..."
- Ask for feedback: "How can I better support you in this experience?"

With changing responsibilities in a time of more telework, there might be learner downtime or time where the preceptor has a conflicting obligation. Consideration for any downtime activities should be dependent on the learner level of autonomy and availability of the preceptor to introduce and/or explain the activity. Consider the following ideas to help plan your learner's time:

- Arrange for the learner spend time with a colleague (consider a fellow pharmacist or interprofessional co-worker).
- Schedule dedicated project time or patient care work up time.
- Discuss an already prepared topic presentation.
- Find a topic or journal article of interest and schedule a future journal club or topic discussion.
- Assign the learner work to do that offsets work for the preceptor—consider prepping a medication

message, provider alert, or patient care note.

- Provide a self-directed learning activity on either a disease state or learner wellness (e.g. ASHP Resident Resources, ASHP Busy Day Toolkit) for the learner.

## Post-Rotation

Ideally, feedback is requested and received throughout the rotation so the experience can be altered to meet the needs of both the learner and the preceptor on an ongoing basis, and this can still be accomplished with virtual precepting. Scheduling time weekly for feedback and evaluation with the learner can help to achieve this ongoing status of improvement. Summing up the rotation feedback and sharing it with the learner, especially regarding how successful virtual precepting and learning was during the rotation, is especially important. This feedback for the learner likely centers around their virtual professionalism, communication skills, ability to plan, and response to change. This specific virtual learner feedback, coupled with your own reflection, will help to guide what adjustments to make for future rotations, adjustments the learner needs to make, and how you can personally better accommodate future virtual learners as

a preceptor. Feedback from your virtual precepting team is also vital to ensuring adequate learner support and continued preceptor assistance in future learning experiences. Be transparent with your precepting team and other team members with any changes made to the rotation and be receptive to ongoing feedback. Consider the following when reflecting on a learning experience:

- What were the major successes of the learning experience?
- What specific feedback did the learner provide?
- What technology challenges occurred?
- What learning experience objectives were not met?
- What physical space concerns exist during the next learning experience?
- Which preceptors will be available during the next rotation?
- Will multiple learners be present for the next rotation?
- Do I need to reach out to the school of pharmacy, a residency program director, or other departmental leader?

## Closing

Virtual precepting comes with its own unique set of challenges, but a rewarding experience for both learner and preceptor

is very achievable. A lot of what makes up a strong in-person rotation remains true for a virtual rotation. Additional effort is needed throughout the rotation to establish a schedule and plan. Setting the plan is helpful, but ultimately, expecting the plan will change is a healthy approach that will prepare both preceptor and learner for change. Remember to be flexible, adaptable, mindful, and kind as things are continuing to change. A positive attitude will strengthen the learner-preceptor relationship as well as ultimately benefit patient care.

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