

PRECEPTOR SERIES:

To Infinity...and Beyond! Pearls for Launching a Successful Career as a New Pharmacy Preceptor

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Precepting can be a daunting concept, especially for new practitioners. After getting assigned or volunteering to precept a rotation for the very first time, self-doubt can creep in. You might wonder “Am I qualified based on my limited experience?”, followed shortly afterwards by “What do I do now?”. As a new pharmacist, there can be a distinct advantage as a preceptor based on temporal proximity to the learner. This can be a powerful asset to planning a successful rotation, since Advanced Pharmacy Practice Experiences (APPEs) and/or residency may not have been completed too long ago. Preparation should leverage the freshness of those experiences to mimic and incorporate the activities that best promotes learning and engagement. Steps can be taken to optimize both your experience as a preceptor and the learner’s experience long before they ever arrive at the rotation site.

Prior to the Rotation

Activity Planning

As with most things in life, a little planning can go a long way. This is especially true in developing a quality experiential rotation. A good place to start is to take inventory of the roles and responsibilities of your practice and consider categorizing them based on difficulty level (Table 1). For instance, it can be helpful to label each task as beginner, intermediate, or advanced.¹ It is also important, as a new preceptor, to realize that each learner will arrive at their rotation with a different level of knowledge and abilities. A task that is at

the beginner level for one learner, may be an intermediate or advanced task for another learner. As a preceptor, you will need to adjust learners’ responsibilities based on their prior experiences. Having a complete and organized list of activities will make it much easier to sketch out a balanced blueprint and progressive schedule, to maximize what the learners are able to accomplish during their time on rotation.

Activity Resources

Once the activities list is developed and rotation outline is complete, it is much easier to map out what resources the learner will need to complete each task. This can include items like required readings, specific guidelines, sample forms or patient care templates, and policies and procedures.² Resources should also be aligned with the rotation requirements set forth by the learner’s school of pharmacy or residency accreditation standards. Once the activities list is paired with the resources required, it is time to define the expectations for each task you anticipate the learner will complete.

Activity Expectations

Categorizing the difficulty level of each activity makes it much easier to assign expectations that are reasonable given a learner’s experience. The goal is to make each activity challenging for the learner, but not overwhelming. Once developed, the expectations for all activities should be shared with other pharmacy staff and the learner, so that everyone is aiming at the same target.² In the end, having

an organized and matched list of tasks, resources, and expectations should help put you in the best position possible for the first day of the rotation

During the Rotation

And so it begins... Day 1 of your first rotation as a preceptor. While you have done a lot of preparation work, it is important to be able to tailor the rotation to the learner. Having a plan is essential, yet it is just as important to be flexible and adjust the rotation to meet the needs of the learner.³ Many of the principles described here have been discussed in depth in other PSW articles for the preceptor series, but the repetition shows just how essential they are to building a successful rotation and a strong foundation as a new preceptor.

Determining the Learner’s Baseline Knowledge

To start the rotation successfully, it is helpful to determine the learner’s baseline knowledge of the content of your rotation. This comfort level will be very different for IPPE, APPE, and resident learners, so it is crucial to approach each learner individually - especially if you work with learners at each of these phases of their



TABLE 1. Sample Categorization of Learner Activities

<i>Learner Activity Level</i>	<i>Pharmacy Practice Setting</i>		
	<i>Community</i>	<i>Ambulatory Care</i>	<i>Hospital</i>
Beginner	<ul style="list-style-type: none"> • Patient education • Medication histories • Prescription processing & filling • Product ordering or other inventory processes • Controlled substance inventory • Legal requirement evaluation for pharmacy and pharmacy practice 	<ul style="list-style-type: none"> • Patient education • Medication histories • Prescription processing & filling • Product ordering or other inventory processes • Controlled substance inventory • Legal requirement evaluation for pharmacy and pharmacy practice 	<ul style="list-style-type: none"> • Medication preparation, packaging, & delivery • Medication histories • Attending rounds • Electronic medical record navigation • Shadowing other health care providers • Policy review • Inventory management procedures
Intermediate	<ul style="list-style-type: none"> • Prescription verification • Insurance verification • Prior authorization procedures • Non-sterile compounding • Pharmacy calculations • Patient education material development • Therapeutic substitutions 	<ul style="list-style-type: none"> • Patient profile review • Collaborative practice agreement development or review • Patient education material development • Disease state or other guideline interpretation 	<ul style="list-style-type: none"> • Patient education • Patient care interventions during rounds • Renal & hepatic dose adjustments • IV to PO conversions • Medication error identification and reporting • Drug information questions
Advanced	<ul style="list-style-type: none"> • Prescriber phone calls • Over-the-counter product recommendations for patients • Blood pressure screenings • Vaccine administration • Compounding • Transferring prescriptions • Billing insurance 	<ul style="list-style-type: none"> • Billing insurance • Comprehensive medication management • SOAP note documentation • Patient work-up • Point of care testing • Vaccine administration • Case presentations • Business plan development for new or additional pharmacy services 	<ul style="list-style-type: none"> • Pharmacokinetic monitoring • Warfarin management • TPN monitoring and/or preparation • Sterile & nonsterile compounding • Chart review • Protocol & order set development

career. The Aurora Cancer Care setting uses a survey that asks the learner to document several strengths, weaknesses, parts of oncology pharmacy they are comfortable with, parts they struggle with, and their goals for the rotation. On the first day of the rotation, a discussion of the learner's responses helps set the tone for the direction of the rotation. This information is useful in tailoring the rotation to build on the learner's strengths, while also focusing on improving the learner's areas of weakness. Understanding your learner's baseline knowledge will help you to develop realistic and reasonable expectations for the rotation.

Setting Expectations

One of the biggest frustrations in life is unmet expectations. The same is true for both learners and preceptors during experiential rotations. It is essential to discuss both preceptor and learner expectations at the beginning of the rotation to ensure a successful and healthy learning environment. Be specific and clear when you communicate your expectations. Encourage the learner to write down your expectations so they can refer to them during the rotation. Setting clear expectations up front helps to build the

foundation for feedback and evaluation as the rotation progresses.⁴

Providing Continual Feedback

Receiving feedback – both positive and constructive – is fundamental to learners' growth and advancement in their pharmacy career. Providing continual feedback allows for early identification of unmet expectations and lessens the likelihood of a difficult situation.⁵ Effective feedback provides the learner with an actionable plan to improve performance, while also acknowledging their strengths and aspects of the rotation in which they are excelling. Many feedback models are available and preceptors are encouraged to select and master a model that works best for their personal style.⁶ Providing effective feedback throughout the entire rotation will help to ensure that the rotation ends on a positive note, and allows the learner to leave with a sense of accomplishment and a plan for further development.

After the Rotation

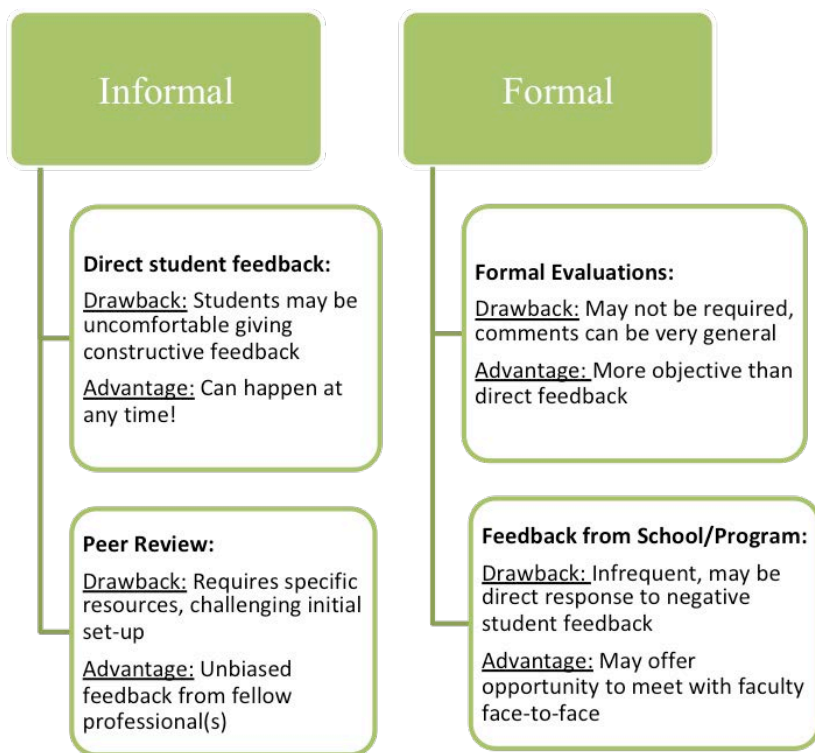
Upon successful completion of your very first student or resident rotation, you may feel that your work as a preceptor is done. Take time to breathe a sigh of relief! Afterwards, realize that you've just begun

your journey. Just as learners are expected to self-reflect upon their performance, preceptors should pause to think about whether optimal precepting practices are being utilized.

Feedback

All preceptors should use feedback to evaluate and improve student performance, but it can be equally important to improving your own skills as a preceptor. Both informal and formal feedback provided by learners can provide valuable suggestions to improve your rotation.⁷ Four primary sources of feedback may be useful in continuous rotation improvement (see Figure 1).⁸ Informally, you as a preceptor may solicit feedback from your students and residents. This could happen during midpoint and final evaluations, or at any point during the rotation. Formal feedback is typically provided by the school/college of pharmacy or residency program and may be sent directly to the preceptor or require you to run an independent report. Results and comments are usually pooled to protect the identity of the learner, but they should be reviewed regularly and will likely provide strengths and opportunities for improvement.

FIGURE 1. Sources of Feedback for Rotation and Preceptor Performance⁸



Self-Reflection

Another key component of preceptor development is regular self-reflection. We expect learners to self-evaluate and preceptors should do the same! After compiling and reviewing feedback, consider completing a structured self-reflection exercise. Ask yourself, honestly, how the rotation went. Suggestions for questions to ask could include:^{8,9}

- Was I prepared for the rotation?
- Was it well-organized?
- Did I act as a role model throughout?
- Did I provide regular feedback? Was it both positive and constructive?
- Did I encourage the learner to self-evaluate?
- Were the methods I used to teach/question the most effective?
- Was student progress observed?
- What steps can I take to improve as a preceptor?
- What do I plan to do to address these areas for improvement and feedback received?

A SWOT (strengths, weaknesses, opportunities, threats) analysis may be used to self-evaluate precepting abilities/qualifications and aid in formation of

SMART (specific, measurable, attainable, relevant, time-bound) goals.⁷ Self-reflection and feedback should be used to write goals and create an overall plan for professional development.

Continuing Preceptor Development

Many resources exist for continuing preceptor development. A good place to start for members is the ASHP Preceptor Toolkit.¹⁰ Additionally, many colleges of pharmacy offer preceptor development programming and resources to their pharmacy preceptors. Consider attending professional local or national meetings such as the ASHP National Pharmacy Preceptors Conference. Lastly, never underestimate the value of mentorship! Finding an experienced preceptor to serve as a mentor can help to provide outside perspective, feedback, and an invaluable source of advice.

Creating a sustainable model of continued self-evaluation and preceptor development will help you launch your lifelong journey in experiential education. Each learner will begin a cycle of preparation, action, and revision. Utilizing tips, tricks, and tried-and-true strategies throughout the entire precepting progress

– starting before the rotation begins and ending after the learner’s rotation – will help to transform you from a novice into a precepting pro.

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