

## Setting Expectations Checklist

### **Orientation to practice**

- Learner work space, reference materials \*
- Dress code: name tag, lab coat? \*
- Hours/ days patient care provided \*
- Parking, phone system, email \*
- Introduce staff, each one's responsibilities \*
- Unique learning opportunities
- (clinical activities, patient population, provider interests)

### **Orientation to community**

- Community characteristics \*
- Community resources, arranging visits to them \*
- Where to buy groceries, do laundry \*

### **Overview of rotation**

- Relate rotation to learner's career plans

### **Introduction to learner**

- Rotations completed \*
- Experience and skills mastered
- Areas needing work

### **Expectations of School or Residency**

- Course objectives
- Criteria included in evaluation form

### **Learner Objectives**

- Specific knowledge, skills, and attitudes to develop
- Grade expectations

\* Topics that office staff might go over with learners

### **Preceptor Expectations**

#### **Daily routine**

- Hours/ days learner in the office
- Learner's level of responsibility and autonomy in providing patient care
- Hospital rounds, night/weekend call
- Times preceptor is off; what to do
- Amount of reading expected

#### **Office policies**

- Directions for writing chart notes, dictating, writing Rx's, referrals
- How pts selected for learner to see
- Length of time to spend with each pt
- Hospital policies

#### **Values**

- Show respect to pts & staff; how?
- Get to know pts?

#### **Preceptor/learner interaction**

- Format for case presentations
- Regular time & process for feedback
- Integrate teaching and learning styles
- Learner needs to explain needs
- Criteria to evaluate learner ("what it takes to get honors")
- Learner self-evaluation before discussing preceptor's evaluation

#### **If a problem arises**

- Absentee policy, how to notify office
- A contact for questions or problems
- How to reach preceptor in emergency

#### **Rotation objectives**

- Requirements based on practice's unique learning opportunities
- Specific knowledge, skills, attitudes you notice learner needs to work on

## Learner Background Form

Learner \_\_\_\_\_ Preceptor \_\_\_\_\_

\_\_\_\_\_

School, Course \_\_\_\_\_ Dates of Rotation \_\_\_\_\_

\_\_\_\_\_

**Personal information** (anything that will help the preceptor and practice get to know you a bit):

### Previous clinical experience:

Rotations completed:  
you have had:

Family Medicine     Pediatrics  
 Medicine             Psychiatry  
 OB/GYN               Surgery  
 Other: \_\_\_\_\_

Other clinical experiences

### Clinical interests:

Aspects of medicine you have particularly enjoyed or disliked so far, and why:

### Career interests at this point:

### Special Requests for this Rotation:

Specific topics, skills, or problems you hope to address during this rotation (please describe how your interests might be addressed):

**Areas in which you would like specific feedback during the rotation:**

## Sample Teaching Notice

Thank You!

**This practice serves as a teaching site for students at the State  
University  
School of Medicine.**

**As a patient of this practice,  
you are helping educate future doctors in the skills necessary  
to be  
competent and caring physicians.**

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Practice Medical Director

## Sample Schedule for a One Month Rotation

**Learner:** Jesse Banks, 4<sup>th</sup> year med student at State University Medical School

**Preceptor:** Jane Long, MD (day off: Wednesday)

**Rotation dates:** Feb 1-26

**Learner interest:** Surgery (learner filled out Learner Background form on 1<sup>st</sup> day)

**Project:** Prevention: literature review, patient assessment, prepare office protocol and present to practice clinicians (school requirement)

**Community activities:** Hospice, Health Dept (standard for all learners)

	MON	TUES	WED	THURS	FRI	WEEKEND
am	<b>Feb 1</b> Orient: Office mgr	<b>2</b> Preceptor	<b>3</b> Practice partner	<b>4</b> Project	<b>5</b> Preceptor	<b>6-7</b> --
pm	Preceptor	Preceptor	Practice partner	Preceptor	Preceptor	--
am	<b>8</b> Preceptor	<b>9</b> Preceptor	<b>10</b> Practice management: Office mgr, Front office	<b>11</b> Project	<b>12</b> Preceptor	<b>13-14</b> ON CALL: Preceptor
pm	Preceptor	Preceptor	Practice partner	Preceptor	Preceptor, Mid Evaluation	ON CALL: Preceptor
am	<b>15</b> Off	<b>16</b> Preceptor	<b>17</b> Surgeon in town	<b>18</b> Project	<b>19</b> Preceptor	<b>20-21</b> --
pm	1 Hospice	Preceptor	Surgeon in town	Preceptor	Preceptor	--
am	<b>22</b> 8 Health Dept	<b>23</b> Preceptor	<b>24</b> Practice partner	<b>25</b> Project	<b>26</b> Preceptor	<b>27-28</b> --
pm	Preceptor	Preceptor	Practice partner	Preceptor	Preceptor, End Evaluation	--

# Blank Schedule

Learner:  
Preceptor:  
Rotation dates:  
Learner interest:  
Project:  
Community activities:

School/Program:  
Day off:

	MON	TUES	WED	THURS	FRI	WEEKEND
am						
pm						
am						
pm						
am						
pm						
am						
pm						

## **A Preceptor Development Program “THUMBNAIL”**

### ***Integrating the Learner in the Busy Practice***

Your office or clinic is a busy place and becoming even busier. At the same time, your office is an increasingly valuable site for training health professionals. How can you integrate these learners into your practice while maintaining your sanity and your bottom line? The following suggestions have been supplied by experienced community-based preceptors. Read more suggestions and share your own at the preceptor development web site: [mtn.ncahec.org/pdp](http://mtn.ncahec.org/pdp)

#### ***Orient the Learner***

- Solicit staff help in orienting the learner to your practice.
- Develop a checklist of orientation topics; if you teach a lot, write out policies & expectations.
- Go over expectations with learner at lunch on the first day or night before the rotation starts.

#### ***Seek Patient Acceptance of the Learner***

- Tell patients that you teach: put a sign in your waiting room or an article in the newspaper.
- Ask for patient permission to be seen by learner, emphasizing patients' role as teacher.
- Thank patients for working with learner.

#### ***Schedule for the Learner***

- Schedule 1-2 fewer patients per teaching day, OR schedule more acute “work-in” patients, OR expect your workday to be 45 minutes longer when teaching.
- Schedule some breaks: have learners spend a half-day at a time with your partner, office staff, or community agencies such as Hospice.
- Assign independent projects such as reading, a literature search, a chart audit, or development of patient education materials.

#### ***Keep Things Moving***

- Have learner see every third patient: learner sees first patient as you see second; learner presents to you and you see patient together; learner writes chart while you see third patient.
- Use focused teaching techniques such as the One Minute Preceptor.
- When behind, tell learners to do some reading (warn in advance this sometimes happens).
- For learners that take a long time with patients, set time limits for each encounter.

#### ***Find Time to Teach***

- Focus on brief teaching points during the day.
- Keep notes and address larger teaching topics at set-aside times (end of the day or start of the next day) or “down” times (as you drive to the hospital for rounds, on call, at lunch).

