

Appendix A: 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:

Family Medicine Pediatrics
 Medicine Psychiatry
 OB/GYN Surgery
 Other: _____

Other clinical experiences you have had:

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:

Appendix B: Setting Expectations Checklist

I. General Orientation

Introduction to practice

- θ Learner work space, references*
- θ Dress code: name tag, lab coat?*
- θ Hours/ days patient care provided*
- θ Parking, phone system, and mail*
- θ Introduce staff & responsibilities*
- θ Unique learning opportunities
(clinical activities, patient population,
provider interests)

Introduction to community

- θ Community characteristics*
- θ Community resources, arranging
visits to them*
- θ Where to buy groceries, do laundry,
etc.*

Overview of rotation

- θ Relate rotation to learner's career plans

Introduction to learner

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

II. Clarifying Expectations

Expectations of School or Residency

- θ Course objectives
- θ Criteria included in evaluation form

Learner Objectives

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

Preceptor Expectations

Daily routine:

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

Office policies:

- θ Directions for writing chart notes,
dictating, writing Rxs, referrals
- θ Which patients learner should see
- θ How long to spend with each patient
- θ Hospital policies

Values:

- θ Show patients & staff respect (how?)
- θ Other:

Preceptor/learner interaction:

- θ Format for case presentations
- θ Regular time & process for feedback
- θ Integrating teaching & learning styles
- θ Learner must explain own needs
- θ How you evaluate learner ("what it
takes to get an honors grade")

If a problem arises:

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

Rotation Objectives:

- θ Required activities based on
practice's unique opportunities (i.e.
learn to manage chronic back pain,
conduct chart audit, etc.)
- θ Specific knowledge, skills, attitudes
you notice learner needs to work on

Appendix C: Rotation Objectives

* This form is to be completed in the first week of the rotation and then referred back to during mid-rotation and end-rotation evaluations. Both the preceptor and the learner should be given a copy.

Learner _____ **Preceptor** _____

School, Course _____ Dates of Rotation _____

The learner and preceptor agree to the following specific objectives for this rotation (regarding learner's knowledge, skills, or attitudes; specific procedures, type exams, clinical problems, psychosocial issues; etc). Strategies for meeting these objectives include:

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**Appendix D:
Learner Request For Clinical Experiences**

* Post in a prominent place in the clinical area or distribute copies to staff.

Learner _____ Preceptor _____

School _____ Year _____ Rotation Dates _____

Course _____

To: Receptionists, Nursing Staff, Providers

This learner would like to have more exposure and hands-on experience in the following areas during this rotation. Please make a special effort to involve the learner in these activities:

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Setting Expectations Timeline

Before the Rotation

- Know the school’s expectations. Review course objectives and evaluation criteria as listed on the evaluation form.
- Identify your own expectations as a preceptor.
- Solicit staff help in orienting learner to practice and community.
- Block out time on the first day of the rotation to discuss expectations with learner.

As the Learner Arrives

- Orient learner to the practice, community, and rotation.
- Assess learner’s level and background.
- Meet with learner to discuss school, learner, and your expectations of rotation.
- Agree upon 5-7 rotation objectives. Consider writing them down.
- Let clinical staff know learner’s clinical objectives of rotation, so they can help.

During the Rotation

- Refer to expectations and rotation objectives as you give learner feedback on cases presented, during daily debriefing, and at mid-rotation evaluation.
- Make sure clinical staff are bringing learner in for cases related to clinical rotation objectives.

At End of the Rotation

- Refer to expectations and rotation objectives as you evaluate learner.
- Collect feedback and note changes needed in process of orientation and clarifying expectations for next rotation.