

A Guide for Physician Preceptors

Community-Based Preceptorships



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General Internal Medicine Statewide Preceptorship Program

Course Manual Introduction

This manual provides suggestions for conducting a successful and rewarding preceptorship in your office. These materials emphasize the following points:

- Your careful planning and preparation are essential if the preceptorship is to be a good experience for both you and the student.
- Nothing is more important than getting started on the right foot: you never get a second chance to make a good first impression.
- Students want and need frequent feedback. Documentation is crucial.
- Students appreciate the opportunity to experience the “real world” of medical practice. They enjoy as much hands-on clinical education as possible.
- By the same token, for the preceptor, “To teach is to learn again.” And it’s fun!
- You are an important role model for the student. A good final impression may be life changing.

The Course Manual includes teaching guides and worksheets which are provided as a tool to be an effective preceptor. Determining specific learning goals is recommended as a way to keep the preceptorship experience on track and consistent with the program objectives. Keep in mind that the student will likely be in the first or second year of medical school, with little, if any, clinical experience. Each student’s skills will vary, so *use your judgment in determining appropriate activities for the student.*

General Internal Medicine Statewide Preceptorship Program

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**Business Office
Texas Chapter of the ACP
401 West 15th Street, Suite 700
Austin, Texas 78701**

**Phone: (866) 244-6777 toll free
Fax: (512) 370-1635
E-mail: TXACP@texmed.org
www.gimspp.org**

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Tips and Tools for Success



Preparing Your Practice

- Approximately a week in advance of the student's arrival, review the student's application and information forms provided by the Preceptorship Program Business Office. Start thinking about an initial teaching plan to incorporate the General Internal Medicine Statewide Preceptorship Program curriculum and student objectives.

Program Curriculum Statement

Emphasis is placed on familiarizing the medical students with the operation of a clinical practice and allowing them to experience the full range of activities in the life of a General Internist. Medical students at this early stage of training have learned the rudiments of medical interviewing and physical examination. They will function initially as observers of patient visits, progressing to greater degrees of involvement as ability allows. It is important for the student to gain comfort in patient interactions. Working with a nurse and other staff in the office, students at even early stages of training can learn to counsel patients in health maintenance and disease prevention. Although participation in the physician's office activities is the central goal of the experience, participation in hospital rounds, meetings, and social activities is encouraged.

Student Objectives

At the end of the four-week rotation, the first and second year students should be able to:

- ✓ Develop rapport with patients, conduct patient interviews, develop history-taking skills, develop physical examination skills, and confirm findings on patient examinations.
- ✓ Comprehend medical procedures performed and techniques used by the physician whom he or she has observed.
- ✓ Explain the rationale used in making a diagnosis and developing a treatment plan.
- ✓ Interview a patient with a single complaint, such as a sore throat.
- ✓ Perform a single organ system examination, such as the heart.
- ✓ Understand the roles of allied health professionals in the practice and be familiar with procedures they perform.
- ✓ Develop an understanding of practice management (the business side of the practice), which involves staffing, billing procedures, scheduling, record keeping, and personnel policies.
- ✓ Realize the value of accompanying the physician on hospital rounds, taking call, and visiting other locations where the physician practices.
- ✓ Understand the importance of participation in local, county, or state medical society/ medical staff meetings.
- ✓ Appreciate the role of the physician in the community and the importance of participating in community events.



Meeting Objectives and Program Curriculum

Although the preceptorship experience will be different for each student, the above curriculum and objectives are designed so that each student will receive a well-rounded experience. To facilitate this, twelve worksheets (located in Section 2) which correspond to the student objectives are provided as a tool for the physician preceptor.

- Several days in advance of the student's arrival, notify your office staff and colleagues of the student's arrival date and distribute a copy of the student's application to those who will be working with the student. Be sure your office staff are fully briefed on the student's participation and responsibilities, including experiences that may involve them and their areas of responsibility. Your staff serve as a vital source of information for the student and they need to be adequately prepared.
- Determine location, and equip as necessary, the student's "office space."
- When the student is in the office, post notices (samples located in the back pocket of this binder) about the student's presence in visible places around the reception area and at the front desk. Ask the reception staff to point out that you are teaching a student.

When the Student Arrives

- Together, go over the General Internal Medicine Statewide Preceptorship Program curriculum and objectives, discussing the educational goals, expectations and your plan for achieving them. Discuss what the student expects to learn from the preceptorship experience as well as what the General Internal Medicine Statewide Preceptorship Program expects. Determine how to match requirements and interests with responsibilities. Agree to a "learning contract" and a program methodology (see samples of each in Sections 2 and 3).
- Orient the student to the office and to his or her "office space." Introduce the student to your staff and colleagues and make him or her feel welcome. Explain the role of each staff person and discuss the importance of each one in your practice. Talk about patient population demographics and any special characteristics of your practice, including your special interests and skills.
- Establish ground rules including the days and hours the student is expected to be in the office, student responsibilities, dress code, parking, and other office policies. Discuss potential schedule conflicts and try to minimize them up front to avoid problems later.
- Brief your office staff about the student's schedule and responsibilities. Be sure they understand what their role will be with the student - and when.
- Early on, try to get to know the student on a personal as well as a professional level. Scheduling some time to get together for lunch or after regular office hours, especially outside the office, helps both of you get to know and understand each other better.

Student Liability Coverage

- The student will be covered for malpractice insurance through the school in which he/she is enrolled. Each day is covered, including weekends, from the first day specified through the last. You should be aware that the student will not be covered for any time preceding or exceeding the dates as determined in placement correspondence from the business office.

This statement does not in itself serve as proof of coverage. Should such a guarantee be needed, please contact the business office and preceptorship program staff will be glad to make the request to the medical school.

Patient Participation

- Inform your patients that you are teaching a student.
- Ask for a patient's permission before bringing the student into the examining room or your office. Most patients will react positively and be willing to have the student in the room. Never assume this to be the case, however. Allow each patient to make this determination. Your patients' feelings should always come first.
- Plan other activities for the student when patients refuse student contact. Ask the student to watch slides or videos, listen to an audio cassette, read an article, research an interesting case, or spend time with a colleague or staff member such as a lab tech.
- Be sure your office staff informs you about any positive or negative feedback about the student which they hear from patients.

The Preceptorship Experience

- Your practice is the student's classroom. Everything you do is part of being an Internist. Expose the student to your busy schedule and to as many of your activities as possible - both with patients and on their behalf, and as a physician and member of the community. Let the student see how you relate to other specialists and medical professionals, how you keep up on medical knowledge, what you do in the hospital and other settings, and your participation in professional organizations or civic and community activities.
- Allow the student to watch you with selected patients in all settings. Try to select patients of different ages and other demographic characteristics, and with varied problems or reasons for seeing you.
- If/when the student is given some direct patient care responsibilities, be educationally specific and time-limiting. For example, "Please go in and get as much history as you can in 10 minutes and then come out and present it to me." Try not to squeeze too much into the teaching encounter. Focus the student on one area at a time, such as data gathering, a specific examination, or presenting a differential diagnosis.

- If “homework” is appropriate, ask the student to read about the problems of patients he or she has seen. Be specific on what to read and where to find it. Ask the student to give a ten minute oral presentation on a problem the day after the student saw it in a patient.
- Be realistic about how much you attempt to teach and how much you expect the student to learn. Stick to defined student objectives and interests.
- Remember to expose the student to the management and administration of office practice. Patient scheduling, telephone interaction, record keeping, as well as information management, coding, and billing are important aspects of practice that students rarely have an opportunity to see.
- Attempt to have regular question and answer sessions, such as at the end of the day. Assure the student that your door is always open but set limits on encounters. For example, “You can have five minutes for questions and then I need to give you some feedback on the patient we saw together yesterday.”
- Ask the student to carry a notepad at all times so when questions arise, they can be jotted down for discussion later.
- Listening as well as talking to the student is very important in the learning process. Learning can go both ways and you may occasionally learn something new from the student, or at least look at something old in a different way. Try to make the student-teacher experience positive for both of you.
- Honor appointments. If you say you will discuss patients with your student at the end of the day, be sure to do so.
- Be honest with the student. If asked about the pitfalls of practice, answer candidly. But do not forget to give equal time to the benefits and rewards. No career is perfect or hassle free. Enthusiasm is catching and the student is looking to you as a role model...BE ONE!

Teaching Styles

The following description of teaching styles is offered to help community-based preceptors become more discriminating observers of their own teacher-learner interaction. Teaching styles fall into one of four primary types: assertive, suggestive, collaborative and facilitative. While no preceptor uses one teaching style exclusively, we each have a preferred or dominant style. Preceptors are encouraged to consciously adapt their teaching style to the learning situation, and to utilize a variety of styles throughout the day.

Assertive	Suggestive	Collaborative	Facilitative
Gives directions	Suggests alternatives	Elicits/accepts student ideas	Elicits/accepts student feelings
Asks direct questions	Offers opinion	Explores student ideas	Offers feelings
Gives information	Relates personal experience (model)	Relates personal experience (empathize)	Encourages
			Uses silence

Characteristics of teaching styles may be arranged on a spectrum from teacher-centered to learner-centered.



Assertive	Suggestive	Collaborative	Facilitative
Emphasis on preceptor's	Information changes to opinion	Mirrors problem-solving	Content shift to affective domain
Preceptor defines direction & provides information	Alternatives presented	Open ended questions	Promote self-understanding discovery
Example: provide a drug dosage	Example: describe alternatives for disease management	Example: explore how differential diagnosis is made	Example: elicit feelings regarding a sensitive issue, such as doing a pelvic exam
Example: hold scope properly	Example: describe pros & cons of different approaches	Example: invite learner to share case	Example: elicit feelings of concern for others, such as when necessary to deliver bad news

Evaluating the Student

- Evaluation of the student should be an ongoing and frequent process. The most common complaint of students is that nobody tells them how they are doing.

*The purpose of evaluation often falls into two categories: summative and formative. Summative evaluation is utilized to certify or judge competency. Formative is used to improve learning. In the preceptorship experience, use of formative evaluation is most often appropriate.

	Summative	Formative
What is being evaluated?	Performance	Performance & reason for lack of success
When does evaluation take place?	At the end	Throughout
How does it happen?	Mostly objective	Less objective, more subjective
Who evaluates?	Teacher	Teacher & student

- Use the worksheets provided in Section 2 or a computer record to make notes on the student at the end of each day.
- Focus on the performance of the student instead of evaluating the person.
- Save feedback for the end of the day or when there is time to discuss it privately and thoroughly in a relaxed and supportive atmosphere. Use notes to help you recall the student-patient encounter or other situation.
- Practice the true definition of feedback: the provision of information from an observer (you) to the performer (the student) without judgment about quality.
- Try using one of the following feedback techniques. Balance “good” and “bad” feedback when discussing performance.
 - (1) The “human video” approach - tell the student what you saw him/her do (no interpretation; easiest to accept)
 - (2) Personal reaction (not judgment)
 - (3) Prediction of likely outcome (judgment based on your own experience)
- Be constructive in your personal and clinical criticism and allow for appropriate feedback. Positive feedback reinforces what was learned and motivates continued intellectual activity.
- Compare your assessment with that of the student. Share information.
- Review the objectives of the preceptorship periodically with the student to see if you are on track.
- Schedule the final review with the student at a time when both of you will not be interrupted.
- Prepare for the final evaluation. Review the program evaluation criteria. Gather feedback from others who worked with the student.
- The review should:
 - be based on a systematic observation recorded over a period of time
 - emphasize both changes in behavior (improvement) and progress toward stated goals
 - be both verbal and written
 - give the student an opportunity to provide input and feedback

- Complete the General Internal Medicine Statewide Preceptorship Program Preceptor Evaluation Form, included with this manual. This evaluation form will be kept confidential, unless otherwise authorized by you. This evaluation must be submitted to the business office as soon as possible after the end of the student's rotation. The student will receive a stipend to help offset expenses and may be eligible for academic credit if approved by their medical school. Neither of these can be issued until both the physician's and the student's evaluations are returned.
- A month or two after the preceptorship ends, follow up with a personal note or call to the student, especially if he or she seemed "turned on" by Internal Medicine. A little encouragement following the in-office experience could make a difference in the student's career choice.

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Objectives and Strategies



Preceptorship Program Objectives and Strategies

Read through the following objectives. Each objective corresponds to one of the Student Objectives listed in Section 1. These are suggested aids and you are not required to submit the objectives. However, with good planning and preparation these objectives may be very beneficial to the you and the student.

Refer back to Section 1 for the Program Curriculum Statement and Student Objectives.

Objective 1

Subject: Planning the Preceptorship

Objective: To schedule a learning experience that will be rewarding for both medical student and physician mentor.

Strategies:

- ① Familiarize yourself with student's basic knowledge by reviewing his or her application form and student profile at least one week prior to beginning of rotation.
- ② Develop an action plan that will involve student in the community as well as in the practice.
- ③ Involve office staff in developing student's agenda. Make sure "office space" is allocated.
- ④ Publicize that you are mentoring a medical student. Alert your patients by placing a notice in the reception area and at the front desk (samples are provided in back pocket of this notebook).
- ⑤ Meet with student to review his or her goals and expectations.
- ⑥ Share your expectations with student. This will include assigning study topics that are associated with diagnosis, medical procedures, and treatment. You may want to use the *Learning Contract* located in Section 3. Be sure to set a time each day to review and discuss activities.
- ⑦ Discuss policy. Ground rules should include work hours, dress code, responsibilities, etc.
- ⑧ Present a *positive* attitude throughout the rotation.
- ⑨ Use the *Physician Notes* section in each category to record your opinions. Enter daily, if possible.

Amount of time spent: _____

Physician Notes:



Objective 2

Subject: Patient Visits

Objective: To assist medical student in developing rapport with patient, history taking and interviewing patient, and observing the examination.

Strategies:

- ❶ **Developing rapport with patients.** Choose established patients who will consent to have a student present. Select patients with differing ages, ranging from adolescents to senior citizens. Emphasize the need for using different greeting and interviewing mannerisms with each age group.
- ❷ **Guiding the student in history taking and physical examination.** After student develops rapport with patient, permit student to proceed with history taking. Prior to the patient interview, counsel with him or her about questions which should be asked and how they should be stated. Emphasize that history taking, too, is very important in setting the tone for examination of the patient. Counsel student on how to conduct the physical examination and explain the importance of the history and physical examination to the philosophy of Internal Medicine.
- ❸ **Examination.** With patient's permission, allow student to accompany you into the examining room. Time permitting, allow student to view the area of the body that needs attention, such as sore throat. Ask student to list and confirm findings on physical examination, stressing the importance of documentation.

Amount of time spent: _____

Physician Notes:

Objective 3

Subject: Medical Procedures and Techniques

Objective: To acquaint medical student with medical procedures and techniques.

Strategies:

- ❶ Arrange for nurse to acquaint student with medical procedures that are conducted in the office, such as blood pressure taking and glucose monitoring.
- ❷ Assign reading. Recommend articles on widely used procedures, such as coronary artery bypass. (This could be done when physician is out of office or if patient does not give consent for student to be present during examination.)
- ❸ Allow student to observe procedures, such as endoscopy or biopsy, which may be performed in the office or an out-patient facility.

Amount of time spent: _____

Physician Notes:



Objective 4

Subject: Diagnosis/Treatment Plan

Objective: To familiarize medical student with the rationale of diagnosis and development of a treatment plan.

Strategies:

- ❶ **Diagnosis.** Allow student to observe steps that are necessary in making a diagnosis. Explain the rationale of diagnosis. After student has become familiar with examination procedures, he or she should be able to make a diagnosis. This could be accomplished through a short, written report or a brief oral presentation at a time assigned by the physician.
- ❷ **Treatment or management plan.** With the patient's consent, let student observe any steps of the treatment that are performed in the office. When drugs are prescribed, explain how a particular drug, such as *diltiazem*, will interact with other medications. Summarize the anticipated outcome of the prescribed treatment for the student.

Amount of time spent: _____

Physician Notes:

Objective 5

Subject: Interview (Single Complaint)

Objective: To strengthen medical student's interviewing skills on a single complaint, such as sore throat.

Strategies:

- ❶ Have student share skills he or she feels are necessary in interviewing and history taking.
- ❷ Ask student to confirm diagnosis and suggest treatment plan.

Amount of time spent: _____

Physician Notes:

Objective 6

Subject: Examination (Single Organ System)

Objective: To familiarize student with single organ system examination, such as the heart.

Strategies:

- ❶ Ask student to list possible conditions that might be present.
- ❷ Have student confirm diagnosis, listing rationale and possible plan of treatment.

Amount of time spent: _____

Physician Notes:

Objective 7

Subject: Health Care Professionals in the Practice

Objective: Acquaint medical student with the roles of other health care professionals who make up the health care team for your practice. The type and size of the practice influence the composition of the team, which may be made up of nurses, physician assistants, and medical assistants.

Strategies:

- ❶ Arrange for interaction with all office-based health care professionals.
- ❷ Recommend that student observe procedures which nurse uses in monitoring patient ailments, such as blood pressure check and glucose monitoring.
- ❸ Schedule training with nurses or other office personnel regarding counseling patients on topics such as health maintenance and disease prevention.

Amount of time spent: _____

Physician Notes:

Objective 8

Subject: Practice Management

Objective: To acquaint medical student with all facets of practice management. This includes areas of billing, scheduling, and personnel.

Strategies:

- ❶ Arrange for office manager to introduce student to staff. Emphasize that each staff member has an important role, beginning with the receptionist whose telephone skills and scheduling procedures impact the daily schedule.
- ❷ Schedule time for billing staff to give a brief explanation on Medicare, Medicaid, private insurance, and managed care plan(s) billing.
- ❸ Familiarize student with record keeping system of patient files.
- ❹ Give a brief summary of personnel policies.

Amount of time spent: _____

Physician Notes:

Objective 10

Subject: Participation in Local, County, or State Medical Society/Medical Staff Meetings

Objective: To encourage medical student to participate in organized medicine activities at all levels.

Strategies:

- ① Encourage student to participate in Internal Medicine student interest groups and Texas Medical Association activities at the medical school where he or she is enrolled.
- ② Discuss the advantages of association membership at the state and national levels.
- ③ Issue an invitation to your county medical society meeting.
- ④ Invite student to accompany you to a medical staff meeting.

Amount of time spent: _____

Physician Notes:

Objective II

Subject: Participation in Community Events

Objective: To make medical student aware of the role of the physician in the community and his or her contributions to the community. (The extent of participation by the student depends on the desires of physician and student.)

Strategies:

- ❶ Invite student to accompany you to any activities that are being sponsored by service-related organizations in which you hold memberships, serve on boards, or volunteer.
- ❷ Encourage student to attend community functions in which you are participating, such as school board or Chamber of Commerce meetings.

Amount of time spent: _____

Physician Notes:

Objective 12

Subject: Student Evaluation

Objective: To give the medical student an honest, constructive evaluation.

Strategies:

- ❶ Refer to the "Evaluating the Student" suggestions in Section 1, page 4.
- ❷ Refer to *Physician Notes* section at the end of each category to summarize student's activities.
- ❸ Review student goals or expectations and compare these with *Physician Notes*.
- ❹ Meet with student to get his or her assessment of the preceptorship. Share your thoughts on all aspects. Be sure to present comments regarding areas in which improvements are needed.
- ❺ Complete and return the General Internal Medicine Statewide Preceptorship Program Evaluation Form provided under Section 5. This is a confidential document used to obtain your candid input concerning the program. Because the student will receive a stipend for completing the preceptorship program, this form must be completed and returned to the General Internal Medicine Statewide Preceptorship Program Business Office.
- ❻ If the student fulfilled the rotation for course credit, review the school's criteria; an evaluation and a grade may be required.

Amount of time spent: _____

Physician Notes:

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The Learning Contract



The Learning Contract

Each student has different interests, needs, skill levels and background. So, too, does each preceptor, who exposes the student not only to the preceptor's own talents, philosophies, and clinical skills but also to the unique demographics and characteristics of his or her patients, practice, and community.

To help bring all these traits and circumstances together and fashion a valuable, educational experience for both student and preceptor, many use a tool called a "learning contract" that is negotiated between student and preceptor early in the match.

What is a Learning Contract?

The following Learning Contract outlines the student expectations for the preceptorship and serves as a guideline for the preceptor's final evaluation of the student's skills and potential according to specified performance goals.

Simply put, a performance goal is a statement of intent or purpose that sets out in observable and measurable terms the:

- ✓ performance expected of the student and/or preceptor
- ✓ conditions necessary to perform as expected
- ✓ realistic criteria for successful completion of the goal (what, how, where and when)
- ✓ consequences of performing successfully to reach the goal - or not doing so

Developing a Learning Contract

- The Learning Contract is a guide and if used, should be developed and agreed upon as early as possible in the preceptorship.
- On the first day of the preceptorship, the student should set out his or her goals for the preceptorship on the attached form. Ideas for specific strategies to accomplish the goals should also be listed. Student and preceptor should discuss the Program Objectives (listed in Section 1) as well as the student's expectations and suggestions.
- Following that discussion, the preceptor should list three goals or areas on which he/she believes the student should focus during the ambulatory learning experience. Specific strategies to address these areas should be included.
- The preceptor should discuss these goals with the student. After negotiating and clarification, the student should write a summary of the goals and expectations of the preceptorship. Following one last review together, both the student and the preceptor should sign the contract.

Learning Contract

Preceptor _____ Student _____

I. Student Goals

List three academic goals for this preceptorship: (Example: Develop history-taking skills)

- 1) _____

- 2) _____

- 3) _____

List two personal goals: (Example: Observe and model effective communication skills)

- 1) _____

- 2) _____

List specific strategies you suggest for accomplishing these goals: (Example: Perform history and physicals under supervision and report findings)

- _____
- _____
- _____
- _____
- _____
- _____
- _____