

EFFECTIVE PRECEPTOR SERIES

What To Do Before the Learners Arrive

MAKING YOUR CLINICAL PRACTICE A TEACHING PRACTICE

Community-based practices can be excellent educational sites for students because they often offer closer supervision, greater diversity of patient problems and more meaningful teacher-student interactions, when compared with residency-based clinics. Converting a purely clinical practice into a teaching practice primarily involves integrating the learner into the process of care. Therefore, the preceptor, the office staff and the patients all need to be included in the preparations. This pamphlet will provide a step-by-step overview of how you can prepare yourself and your practice for teaching.

PREPARING YOURSELF AND YOUR PRACTICE FOR TEACHING

Get To Know The Educational Program

Before establishing a teaching relationship with a medical school or residency training program, it is important to make sure that the institution's rotation goals and objectives are compatible with what you can provide. In the weeks preceding the arrival of your first learners, it is helpful to familiarize yourself with the educational program by requesting and reviewing the following types of information:

- Course syllabus, with rotation goals and objectives
- Description of the learner's expected role in the office
- Outline of expected teaching and learning activities
- Performance evaluation criteria and grading forms
- Rotation calendar
- Do not hesitate to clarify any questions you have with the sponsoring institution before the learners arrive

Preparing Your Partners And Office Staff For The Learner

Whether you are in a solo practice or a large multi-specialty group, the quality of the learning experience you create in your office will depend on all members of your care team being aware of your goals and expectations for them. Special emphasis should be placed on training staff, who will have the most interaction with the learner, whether direct or indirect. Consider addressing the following issues a few days before the learner arrives:

- Remind everyone of the start date and schedule for the learning activities
- Distribute pictures/biographical information on the learners
- Brief your staff on the learner's scope of participation and duties
- Review with the receptionist how he/she will inform patients about the learner in the office

In addition, it may be especially helpful to coach your receptionist, nurses or other staff to present the learner to patients in a way that supports your teaching effort, but still gives the patient control over the clinical interaction.

Preparing Space And Resources For The Learners

Like your staff, your learner will require some basic resources to function in your office. It is important not to forget to accommodate some of these practical needs:

- Determine where the learner will park
- Identify storage space for the learner's personal possessions
- Designate charting space for the learner
- Determine where the learner can have telephone and computer access
- Consider compiling sample charts and forms to familiarize the learner with your documentation

procedures

- Determine level of access to the patient record required to meet learning goals and procedures for student training that may be required for access to an electronic medical record.

Orienting The Learner

When the learner arrives, you will want to block some time to conduct a brief orientation, which does not have to be during your regular office hours. You can ask the learner to either come early on the first day or come after hours the day before to become oriented. The most important aspect of the orientation is getting to know your learner and providing the learner with insight into your choice of medicine as a career, specialty and practice setting. In addition, the orientation should encompass each of the components outlined in the Orientation Checklist at the end of this resource.

Approaches To Patient Scheduling

The decision to modify your approach to patient scheduling depends on the proposed scope of the educational experience and the competency of the learner. While some learners are primarily shadowing, the learner's level of expertise and previous outpatient experiences may support a more autonomous role in the office. You may consider using one of the two scheduling approaches:

- **Wave Schedule:** This requires a dedicated examination room for the learner in addition to the physician's own examination room(s). Every second or third patient on the physician schedule is asked to come to the office one appointment slot earlier. The patient is first seen by the learner and, then, in conjunction with the physician, resulting in a "double visit." This model results in no net change in patient volume

(assuming an examination room can be spared for the learner).

- **Work-In Schedule:** This model assigns the learner to evaluate urgent work-in patients. Alternatively, the learner can evaluate regularly scheduled patients, while the preceptor evaluates the work-ins. The numbers and types of patients evaluated should meet pre-established curricular goals.

BEFORE THE LEARNER ARRIVES PREPARATORY CHECKLIST

One Week Before The Learner Arrives

- Review the institution's learning goals and objectives
- Review the institution's orientation materials
- Review the student's information or application (if available)
- Have a reliable number for the institution's contact person in case of problems
- Have staff confirm the dates and times of the instruction in your office with the sponsoring institution
- Send any information the learner should know about the practice to the sponsoring institution for distribution to the learner
- Schedule a 30-minute orientation for the learner
- Determine if there are training requirements for electronic medical record use by the learner
- Schedule time at the end of the experience for formal learner evaluation and feedback
- Consider making a brochure or handout for patients about the learner
- Consider altering your schedule for the precepting experience

Two To Three Days Before The Learner Arrives

- Remind staff and partners of the learner's arrival
- Distribute copy of the learner's application or personal information (if available) to staff and partners
- Brief the staff on the learner's responsibilities
- Review with the staff their role with the learner
- Coach the staff on how to present the learner to patients
- Identify a workspace for the learner
- Gather forms or work flow instructions (e.g. laboratory, physical therapy, radiology, consultation) for learner orientation
- Generate staff list, their office locations and a short description of their responsibilities
- Make copies of patient notices about the learner for reception area
- Make a list of what to cover during learner orientation
- If the learner will dictate notes, prepare instructions

Orientation Checklist

- Expectations – Review:
 - The institution's learning goals and objectives with the learner
 - The learner's personal expectations and past experiences
 - Your expectations for the experience
 - Working hours, days off and schedule change procedures
 - Office rules and policies (e.g., dress code, meals, telephone and computer use)
- Teaching – Review:
 - When and how teaching will occur
- Evaluation and Feedback – Review:
 - When and how feedback will be provided

- When the final evaluation will take place
- Office Flow – Review:
 - Scheduling and which patients the learner will see
 - How to order imaging tests and other diagnostic studies
 - How to schedule a follow-up appointment
 - Where to retrieve patient education materials
 - How to retrieve test results
 - Which clinical tests are performed in the office
 - How to handle an office emergency
- Responsibilities – Review:
 - How much time should be spent with patients
 - What parts of the examination should and should not be done in your absence
 - How you want patients presented to you
- Examination Room:
 - Orient the learner to the design and organization of the clinical areas
- Workspace and Notes:
 - Orient the learner to his/her personal workspace
 - Review how you want notes written or dictated
- Informing patients:
 - Introduce learner to staff (including their responsibilities) and to partners
 - Show the learner how patients will be notified of learning activities
 - Consider preparing a learner biography to post in the patient waiting area

Source: Alguire P. et al. *Teaching in your office*. Philadelphia: American College of Physicians, 2001.



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This publication is part of the APGO Effective Preceptor Series – a group of pamphlets intended to educate practitioners and learners about the apprentice system or preceptorship. The quality of learning that occurs in an established relationship between the teacher and the student often meets the challenge of educating physicians in today's chaotic health care environment. It allows doctors in training to practice as much like doctors as good medical practice will allow, and it provides a setting in which some of the best medical education in our nation takes place.

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