



Precepting 101: A Guide For Preceptors



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Jeff Hamper

Lisa Hong

Ha Phan

Olivia Strain

Elizabeth Yett

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Introduction

Congratulations on your role as a pharmacy preceptor! Just as you have may have had great preceptors who made an impact on your personal and professional development, you can make a lasting impact for future pharmacists.

While it may seem intimidating to get ready for a rotation with a learner, with a bit of preparation and organization you'll be able to ensure a great learning experience for your learner, your pharmacy team, and yourself. Throughout the subsequent sections, we will provide tips and ideas for new preceptors and helpful reminders for seasoned preceptors.

Much of this material is applicable for a few types of learners, including both student pharmacists and pharmacy residents, but focuses on student pharmacist learners. For specific requirements to precept pharmacy residents, review the residency accreditation standard.

Types of student pharmacist learners

- Introductory Pharmacy Practice Experience (IPPE) student pharmacists
 - Didactic curriculum provides a rigorous foundation in the biomedical, pharmaceutical, social/administrative/behavioral, and clinical sciences; incorporates IPPE; and inculcates habits of self-directed lifelong learning to prepare students for Advanced Pharmacy Practice Experience (APPE).¹
 - Key elements include¹
 - development and maturation of the knowledge, skills, abilities, attitudes, and behaviors
 - affective domain elements
 - care across the patient's lifespan
 - exposure to contemporary U.S. practice models including interprofessional practice experience
- APPE student pharmacists:
 - Experiential curriculum aims to integrate, apply, reinforce, and advance the knowledge, skills, attitudes, abilities, and behaviors developed in the pre-APPE didactic curriculum and in cocurricular activities.¹
 - Key elements include¹
 - an emphasis on patient care
 - exposure to diverse patient population
 - interprofessional experience
 - Required APPEs occur in 4 practice settings:
 - community pharmacy
 - ambulatory patient care
 - hospital/health system pharmacy
 - inpatient general medicine patient care
 - Elective APPEs are structured to give students the opportunity to mature professionally, to secure the breadth and depth of experiences needed to achieve their educational outcomes, and to explore various sectors of practice.

Getting started as a preceptor

Step 1: Meet state requirements

Before you can begin precepting student pharmacists, you must make sure you meet all of your state's requirements for preceptors. For example, some states require an additional license or certificate from the state board of pharmacy. The best resource to determine what is required in your state can be found on your state board of pharmacy's website. To do so, visit the [National Association of Boards of Pharmacy website](#), use their tool to find your state, and look for a pharmacist preceptor section.



The requirements for licensure may include

- A set amount of time spent as a licensed pharmacist
- Completion of one or two years of residency
- Completion of preceptor training
- Personal reflection of importance of serving as a preceptor
- Verification of your responsibilities in supervising pharmacist interns
- An active pharmacist license
- Completion of annual or semiannual continuing education to renew precepting certificate or to remain active as a preceptor

Step 2: Establish yourself as a preceptor and rotation site

Once you've become licensed or active as a preceptor, the next question is how to offer a rotation for students.

Schools and colleges of pharmacy have an office of experiential education (OEE), which is the go-to for newly certified preceptors who want to begin precepting and offer a rotation. Reaching out to them or checking their webpage is an ideal place to start. OEEs are also great resources if you have further questions regarding what requirements you need to meet to become a preceptor for each specific school/college of pharmacy.

Keep in mind that your employer may also have an internal application and approval process, so contact your supervisor and let them know you are interested in precepting students as well.

The typical school/college of pharmacy requirements may include

- Internal application(s) that may require proof of completion of your state's requirements for preceptors
- Current curriculum vitae (CV) or résumé
- Description of your practice site and role
- Explanation of type of rotation you will offer
- Checklist of site-specific requirements

After you've become onboarded as a preceptor with a given school/college of pharmacy, you will be asked to provide a schedule of availability for APPE and/or IPPE student learners. You may be asked to put this information into an online scheduling system, or you may only need to provide a written request of the number of students you can precept and for which rotations. OEEs usually start requesting availability about a year in advance (typically in the fall or winter) and provide a schedule of students to you in the spring. After your initial request, an OEE should remind you each year when it is time to provide availability for the upcoming year. Oftentimes, the institution for which you are precepting will conduct a preceptor orientation for either or both APPE or IPPE rotations to support you in delivering a successful rotation.

An OEE will often provide preceptors with access to their school's pharmacy resources (e.g., drug information, literature servers, virtual training) and opportunities for live or virtual preceptor continuing education events. OEE offices are also great contacts if you are needing a larger number of students for a very specific event as well (e.g., vaccine clinics, education or screening at a community event).

Step 3: Develop a syllabus, calendar, and activities

Syllabus

Once you have determined which type of rotation you will be offering and registering as a respective preceptor in your state and with the identified schools/colleges of pharmacy, you may be asked to provide a syllabus. Even if you are not asked to provide one, you should create one in order to effectively guide student learners during your experiential rotation by setting clear expectations and performance objectives. The syllabus may contain different elements required by the institution, such as objectives, learning activities, expected learning progression, scheduled rotation interactions, attendance policies, learner evaluation criteria, and contact information. Examples of syllabi are provided in the APhA's [Getting Started as a Preceptor](#) resource book.



Calendar and activities

When creating a calendar, consider a few key items to ensure you and the learner have a successful rotation:

- Start date and end date
- Daily start time and daily end time
 - Be clear if you expect the learner to arrive early or stay late on certain dates, or if you expect the learner to mirror your schedule, including second or third shifts or weekends.
- Midpoint evaluation and final evaluation dates
- Holidays

- Required/highly encouraged events such as conferences, interviews, and/or professional development opportunities
- Time to prepare for daily responsibilities such as patient workup, rounding, dispensing, patient counseling, patient calls, pharmacokinetic analyses, immunization administration, or medication therapy management
- Time to prepare longitudinal projects such as presentations, journal clubs, patient cases, topic discussions, and/or drug information responses

Something that may be overlooked is project time or time to work up patients. Ideally, work provided to a student should not exceed the required rotation hours. When creating a calendar, ample time should be built in for patient workup as well as preparation for projects, presentations, and relevant topic discussions. Starting a calendar with your own daily responsibilities that the learner will take part in and then connecting it with other activities that enhance the learning experience that may help with meeting objectives or learning goals.

IPPE rotation schedules may vary from a one-week experience to once a week for 4 to 6 weeks but will vary based on circumstances. Keep in mind that this is an introductory experience and that this may be their first exposure to your practice site.

One way to structure your experience could be through a layered learning experience, utilizing your APPE to help conduct learning activities for your IPPE. For example, an IPPE rotation could start with the first day as orientation; followed by shadowing experiences building upon different skills such as introduction to utilizing a computer system; followed by introducing them to a patient, mentoring the student through how you work through a patient; followed by the student working through a patient independently by the end of the experience.

Again, schools and colleges of pharmacy will usually have a required list of activities that the learner must complete during their IPPE experience.

APPE rotation schedules typically range from 4-week rotations to 6-week rotations, but they may vary depending on circumstances. Involving students in your daily tasks may fulfill some of the rotation hours, but there may be times when you need to focus on other aspects of your responsibilities that may not meet learning objectives. In that case, you may consider having your learner shadow the workflow of a nurse, pharmacy technician, a different pharmacist, a nurse practitioner, a social worker, or dietitian to get a full interprofessional perspective.

Other APPE learning activity opportunities may include a journal club, drug information questions, case presentation, topic discussions lead by students for other students or lead by residents, completing rounds with other colleagues, verifying prescriptions, administrative duties, academic responsibilities, creating infographics, and listening to podcasts.

Many colleges/schools of pharmacy have a required list of activities that your learner must complete over the course of their APPE experiences. Review this to identify relevant activities that your learner can experience and complete during your rotation.

Step 4: Start the rotation

Conducting a specific rotation and site orientation of your learner on the first day is critical. Arguably, it may be the most important day of the rotation to ensure success for your learner and you as a preceptor. During the orientation, preceptors should consider the following:

- Review the syllabus and calendar, even if they are provided ahead of time, as discussing key aspects of these documents together with learners guarantees their review and reinforces important points.
- Ensure that all expectations are clear. These expectations include dress code, workspace area(s), technology use/agreement, breaks, communication preferences for you as a preceptor, how/when feedback will be delivered, and details regarding daily tasks and longitudinal projects.
- Clarify any questions or concerns learners may have regarding their time on your rotation.
- Conduct a tour of the site, including where the learner can safely store belongings, eat/drink, prepare for their day, and overview of pharmacy practice areas.



In addition to establishing expectations, the orientation can be used to discuss personal and professional development goals, including rotation and overall career goals. This will help you learn about your trainees; additionally, the discussion can facilitate tailoring of the rotation to match the level/interests of each learner. Having the student set their own goals can also serve as a motivating factor, provide the student with a sense of control in their learning experience, and allow for personal accomplishments outside of standard experiential milestones.

The start of the rotation is also the best time to discuss estimated time required to complete scheduled tasks/assignments and expectations from a time management standpoint in order to minimize missed deadlines due to unanticipated workload. Including your own schedule in the calendar so that learners are aware of when you will be unavailable or when they may have time to work on projects may also help with students' time management.

Consider scheduling feedback or discussing with students during orientation how feedback will be delivered (e.g., daily, weekly, midpoint, final) and ensure they know how they will be evaluated so there are no surprises.

Many institutions utilize different electronic medical record systems and dispensing software. Thus, getting students set up (e.g., customizing their electronic health record account and view settings) and reviewing system navigation as well as workflow will be helpful for learners. Keep in mind that learning and getting used to a new system can take time, so review aspects that students/residents will see and use frequently on the first day, then, be sure to follow up regularly. If your practice site has specific protocols that need to be followed or institution-specific resources, review those during orientation as well.

Step 5: Conduct the rotation

Delivering feedback

Feedback should be consistently provided and may be delivered verbally or via written communication. Two types of feedback that are important for a preceptor to provide are formative and summative feedback. Formative feedback is delivered in-the-moment such, as after a learning activity is performed. Summative feedback is comprehensive and related to overall performance and provided at the midpoint and at the final evaluation.

Typically, the institution will provide objectives and entrustable professional activities by which the student may be evaluated and that are related to the type of learning experience or rotation. Within each school evaluation system there may be an area for open comments, a place to provide a rating, and an evaluation on professionalism. Each institution may differ slightly in how each student is evaluated, but their evaluation system should provide you a way to rate completion of objectives and document written feedback by the conclusion of the rotation.

Managing multiple learners

Having multiple learners at once can be intimidating but can also be very rewarding for everyone if done well. Having more than one learner can allow for the workload to be divided, encourage peer collaboration, and improve communication as well as peer teaching skills. Each student has different strengths and weaknesses, and they can help each other through the rotation. Even if the learners do not get along, they can learn valuable lessons in professionalism and how to work with others, which is a valuable lesson in teamwork for their future career.

If there are different levels of learners, it is important to set expectations accordingly in terms of workload, previous experience, etc. For example, IPPE students should be assigned fewer patients than APPE students, who should in turn be assigned fewer patients than residents. Layered learning models provide a valuable hierarchy of teaching and learning. While the preceptor will provide oversight and feedback to all learners, residents can teach/precept APPE students, who can teach/precept IPPE students in all aspects of the rotation. These aspects may include covering orientation, facilitating discussions, practicing patient counseling, preparing presentations, providing feedback,



and being involved in formal evaluations. Layered learning may allow students to see what would be expected of them at each level and exposes learners to both the rotation experience as well as precepting. If learners start at different times, those whose rotation began earlier can orient the new learners, which can increase efficiency. The expectation can be set so that any questions during rotation should be run by the next level up rather than directly to you, which may push upper-level trainees to take ownership of their learning, encourage humility or comfortability in saying “I don’t know,” and facilitate the development of precepting skills. The ability to observe and experience the process of learning to precept is also valuable for all learners.

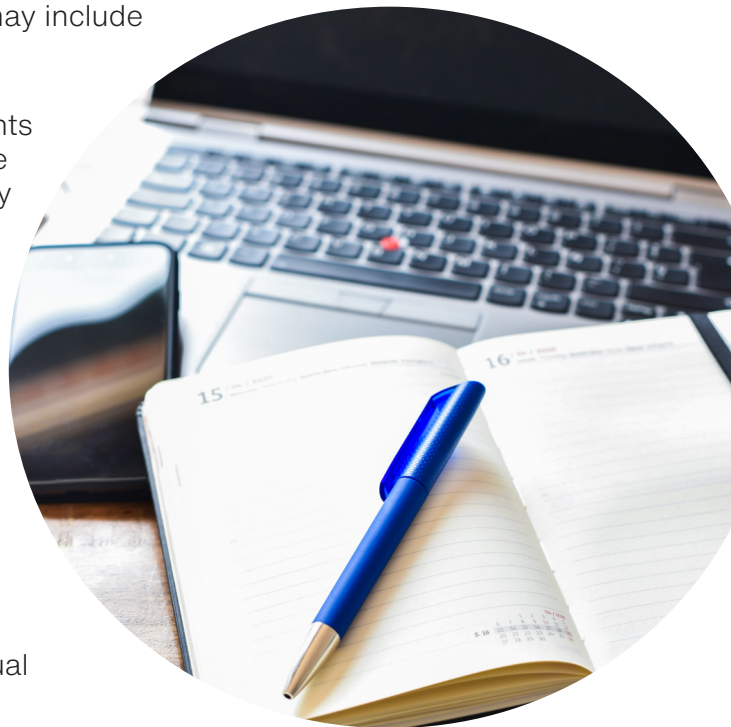
Managing challenging learners

While most students are invested in their own learning and development, and most experiential rotations go well, there may be situations that are more challenging, especially for a new preceptor. Most people do not want to fail, so it is important to give the student the benefit of the doubt and do everything possible to find ways to help the student succeed.

If you have a student who is not meeting your expectations on a rotation, it is important to have conversations about how they can improve as soon as possible. If possible, areas for improvement should be documented by the midpoint evaluation so the student has ample opportunity to improve. If you feel the student is not on track to successfully complete the rotation, it is best to inform the college or school of pharmacy’s experiential office as soon as possible. Finally, if you will not be giving the student a passing grade for the rotation, it is recommended to contact the college or school of pharmacy’s experiential office before submitting the grade.

Some reasons for challenging situations may include

- Differences in personalities and communication styles
 - While preceptors and students may seem on the same page about expectations, that may not always be the case. What you have in your mind may not be what the student interpreted, so do your best to clearly communicate early and often.
 - Ensure directions and expectations are clearly stated and—just like when working with patients—consider having the student repeat back directions or expectations to ensure mutual understanding.



- Diversity, equity, and inclusion
 - Make all students feel welcome and included as part of the team regardless of their background.
 - Recognize that language barriers and cultural differences exist and educate yourself and others as often as possible.
 - Keep an eye on the dynamics of the interactions between the students and their interactions with other members of the team; intervene as needed. Make sure everyone understands that while everyone may not always be friends, treating others with courtesy, dignity, and respect is required of a professional.
- Nonrotation related issues
 - Keep in mind that a pharmacy rotation is not the only important part of a student's life. There may be financial, health, family, or other things on a student's mind that may impact the student's performance. While it is not your role as a preceptor to solve those problems, understanding and discussing these issues may allow you and the student to develop a plan together.
- Practice area
 - Sometimes students have their minds made up about the setting in which they want to practice after graduation, which may impact the amount of effort they put into a rotation that does not align with their plans.
 - Take some time to discuss and acknowledge that your rotation may not be where they see themselves in the future, but they still may learn something extremely valuable during this rotation. Develop learning activities and projects that challenge the student and can help them not only be successful in their future practice setting, but also be successful in your rotation.

Step 6: Complete the rotation

Now that your student's rotation is complete, there are a few next steps or expectations you should have for yourself.

Ask for feedback

While it is not always comfortable to hear what others think about your rotation or about you as a preceptor, it is important for future planning that you check in with your students to learn firsthand what went well and what could be better. When asking for feedback

- Prepare your questions in advance.
 - Limit your list of questions to just a few about the rotation and a few about your precepting style. A shorter list encourages more honest answers, while students may rush through a long list.
- Request specific and honest feedback.
 - Provide examples of broad feedback and examples of specific, actionable feedback.
 - Let the student know their evaluation has already been completed and that the feedback provided will in no way help or harm their final grade.

- Ask open-ended questions. For example
 - What were some of your favorite activities during the rotation?
 - What activities would you prefer to be done differently, if any?
 - What are some ways I can be a more effective preceptor?
- Be committed to change by modeling appropriate receipt of feedback.
 - Thank the student for the feedback and let them know you appreciate an outside perspective and constructive insight because you are always striving for professional and personal growth.

Step 7: Conduct regular preceptor development

As a new preceptor, you will quickly learn that you may serve in many roles simultaneously, from preceptor to coach, practitioner, provider, and/or faculty member.² This is why it's important to continuously develop yourself personally and professionally. But without a plan, this time for growing yourself is usually pushed aside.

There are multiple ways to take advantage of preceptor development:

- Verify if your university or school of pharmacy offers formal preceptor development training at an annual preceptor conference or online.
- Complete APhA's [Advanced Preceptor Training](#) program to gain the knowledge, confidence, and skills to be a successful preceptor.²
- Check with state and national pharmacy organizations, which may offer online and/or in-person preceptor training and development (e.g., annual conferences, networking sessions).

Letters of recommendation

Be prepared for learners to ask for work- or residency-related letters of recommendation, either now or in the future. Letters of recommendation come with a lot of responsibility, so be honest with your learners regarding whether you have the time and are willing to provide a high-quality letter.

- Considerations
 - Date by which you can feasibly complete the letter
 - If your expertise aligns with what the student is applying for
 - What the requirements/expectations are for the letter you are writing
 - Any potential conflicts of interest
 - Submission instructions (i.e., mailed letter, uploaded online, in-person)



Retain notes and evaluations on students who completed rotations with you earlier in the year in case you are asked for a recommendation letter later in the year. Also, it may be helpful to request a copy of the student's CV and/or letter of intent to help guide your letter. Keep in touch with the student(s) going forward. If you do not routinely see the student in-person, follow up with an email to see how the application process is going for the student. Ask if there are any other ways you can assist and simply check in on the student.

Conclusion

Congratulations again on your decision to become a pharmacy preceptor. While it may be challenging at times, being a preceptor is one of the most rewarding ways to give back to the profession of pharmacy. Best of luck, and remember to continue to develop yourself as well! If you haven't already, be sure to join the APhA [Preceptor Special Interest Group](#) and to post your questions and advice on [APhA ENGAGE](#) often!

References

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