# Office of Clinical Education Preceptor Toolkit

**Resources for current and prospective preceptors of Nurse Practitioner and Physician Assistant students**

Indiana University Health

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## Learning Objectives

At the end of this training, you should be able to:

1. Define the term "preceptor"
2. Discover the "why" and realize the benefits
3. Understand the expectations of a preceptor and a student
4. Identify your resources as a preceptor

# What is a Preceptor?

- An experienced practitioner who provides direct supervision during clinical practice and facilitates the application of theory to practice for students.

- Helps students acquire new competencies for safe, ethical and quality practice.

- Sets expectations, provides feedback about the students' performance and appropriate opportunities to meet the students' learning objectives.

# Why should I consider being a preceptor?

**Susan McKinney PA-C, DFAAPA**

*Primary Care*

*IU Health Physicians*

*"This is an incredible responsibility and we must do this well.*

*I think if I can demonstrate my passion for healthcare … I can influence*

*students and hopefully teach them something along the way".*

# Benefits of Being a Preceptor

- Continuing Education Credit (CEU's), and CME's.  For PA's, this is [CME Category 1 credit](#)
- Setting an example of the responsibility to teach students *(who may also be future preceptors)*
- This is a part of the preceptor's CV from a professional development standpoint
- A mentor and role model for the next generation of PA's or NP's
- Helps to ensure quality continuation of the profession
- Opportunity to share past and current knowledge about technology and new discoveries in healthcare
- Changing the lives of students
- Creating memorable experiences
- A rewarding sense of "giving back"
- Can enhance one's professional reputation
- A sense of fulfillment in doing what's right for current and future students
- Helps a student develop as a future clinician for the real world of practice
- Opportunity for professional development

References:

*"Precepting PA students: How you can touch the future"*

http://journals.lww.com/jaapa/Fulltext/2012/02000/Precepting_PA_students__How_you_can_touch_the.1.aspx

*"Precepting in a busy clinic"* http://www.nonpf.org/?page=Preceptor_Vignettes

*"AANP Preceptor Toolkit"*  *https://www.aanp.org/education/education-toolkits/preceptor*

Preceptor Education Program (PEP) http://www.preceptor.ca/index.html

# Expectations and Competencies of a Preceptor

Becoming a preceptor generally requires at least one-year of experience practicing as a professional.

## Preparation

- Facilitate a welcoming environment – let the staff know when the student will be coming; provide a space for the student
- Provide the student with information regarding the nuances of the office/hospital environment such as electronic medical record training and sign-on
- Assess learning needs of the student
- Make sure the patients have agreed to the student participating in their care

## Communication

- Establish a nurturing relationship with the student (Ulrich 2010)
- Communicate clear expectations at the beginning during the "introductory phase" of the relationship
- Communicate clear expectations for every practice day so the student understands what you expect from them that day

## Instruction

- Get the student to commit to a diagnosis and treatment option
- Probe for supporting evidence
- Teach general rules that can be applied to other situations
- Reinforce what was done right
- Correct mistakes
- Discuss ethical principles for care delivery with the student (Ulrich 2010)

*Info obtained by Mary Steinke/IU Kokomo Nursing Program*

References:  Thomas, A. et al. (2011). Nurse practitioner core competencies. Retrieved from:
http://c.ymcdn.com/sites/www.nonpf.org/resource/resmgr/imported/IntegratedNPCoreCompsFINALApril2011.pdf
Ulrich, B. (2010)  The preceptor role. In *Mastering precepting : A nurse's handbook for success*. Indianapolis, IN: Sigma Theta Tau International. Retrieved from:
http://rnpreceptor.com/docs/sampleMasteringPrecepting.pdf

# Expectations of the Student

- Students should complete paperwork and training required by institution in a timely manner.

- Students should have university/facility identification (name badge) at all times during rotation.

- Students should have dates/hours of clinical hours planned prior to start of rotation and approved by both faculty and preceptor- including any evaluation requirements.

- Students must be punctual and professional.

- Students should come prepared with all needed equipment and learning tools including specific learning objectives for current rotation and course syllabus .

- Professional dress and grooming are expected. In any clinical site requiring patient contact, students should wear appropriate lab coats or attire as directed by faculty and preceptor.

- Students should only see patients as delegated by preceptor.

- Students are expected to discuss documentation specifics with preceptor.  If policy permits student documentation in the patient record, the student should sign his/her name & provider relationship.

- Students are expected to contact faculty and preceptor if any concerns arise during rotation.

- Students will provide school instructor and/or clinical coordinator contact information to preceptor.

# The Voice of the Preceptor

- [A Preceptor's Success Story](#)
- [A Preceptor's Success Story](#)
- [Precepting Tips](#)
- "[A Day in the Life" of a Preceptor](#)

## *A Preceptor's Success Story*

**Dr. Bart Besinger, MD**
*Assistant Professor of Clinical Emergency Medicine*
*Associate Director, EM Student Clerkship*
*Department of Emergency Medicine*

The introduction of PA students into the mix of learners in our academic emergency department has been an unequivocal success.  We have integrated them into our pre-existing medical student schedule which affords them exposure to the breadth of emergency department patients from minor complaints to critical illness.  Our rotation is not an observership.  The PA students function as the primary provider for their patients, supervised by emergency medicine faculty physicians and residents.  The students have enthusiastically embraced this role and faculty members have been extremely pleased with their work ethic and clinical performance.

The presence of PA students has substantially enhanced the educational milieu of our emergency department.  Faculty members find them to be a pleasure to teach and their presence provides excellent opportunities for inter-professional education for our other learners, including medical students and emergency medicine residents.

# *A Preceptor's Success Story*

**Robert M. Schrock, RN, MSN, NP-C**
*IU Health Eagle Highlands Family Practice*

In my four years as a Board Certified Family Practice Nurse Practitioner, I have utilized various techniques to precept students.  I have used my prior experiences as a student, knowledge gained from my 20 years of experience precepting paramedic students and my experience as a Nurse practitioner to tweak the process.   I sit down with every prospective student prior to accepting them to precept.  I lay out my expectations and answer any questions they may have.  Once I start precepting a student, I have found by initially allowing students to observe patient care, they gain a better understanding of the complete history and physical, differential diagnosis and clinical diagnostics.  It also allows students the opportunity to ask questions and facilitates a comfort level for transitioning to independence in treating patients.  As the student becomes more comfortable, I allow them to assume patient care in its entirety but I am always in the room with the student as a resource and adjunct to their learning.

After finishing a clinical rotation, I take to heart the feedback I receive from each student on how I can improve as a preceptor and make adjustments for future students.

# *Precepting Tips*

**Lindsay Anderson, MSN, ACNP-BC**

*Acute Care Nurse Practitioner for Trauma
and Critical Care*

*IU Health Physicians*

➢Develop objectives and goals for the students that are specific to your service and patient population.

➢Continually assess learning needs and adjusting individualized goals based on each students' progress.

➢Try to teach time management and patient prioritization in providing care to critically ill patients.

➢Role model evidenced based practice and professionalism, " walk the walk", and hopefully someday your student will become an exceptional preceptor.

➢Provide timely and constructive feedback and coaching.

➢Maintain evidence based practice so you can demonstrate and provide the highest quality of care to your patients.

➢Be open to questions and encourage feedback from the student as well to help optimize their experiences.

➢Utilize all your resources and know that learning experiences do not always have to come from just you, but utilize expert colleagues for experiences (i.e. dietician, pharmacy).

➢Motivate the student, include them in developing plans, critical thinking, difficult situations. Demonstrate enthusiasm and enjoyment in your role.

# "A Day in the Life" of a Preceptor



**Shelly King, NP**
*Riley Pediatric Urology*
*IU Health Physicians*

I have always felt it was an honor and a privilege to teach. Students bring excitement to a practice, they keep us open to new ideas on top of the changing health care environment. Students come in varying degrees of confidence and skill mastery. Helping a student determine how they will become more independent with each clinical experience and watching it happen is rewarding.  We encourage students to read and review the literature and then bring information back to the team. They can bring new insight into specific areas of patient care and clinical education.  Everyone learns in this environment. It's important that the whole office be involved; learning all roles in the professional setting aids in future job performance and leadership within an organization.  Our entire team participates and this helps staff stay focused on patient care and encourages cohesiveness between team members.

Most preceptors cannot reduce their workload when working with students.  We do it because we want to support our profession and our future colleagues. My personal experience is that students bring a very positive influence to my day, and in a very short time they are supportive in the clinical care and education of patients.

Being a preceptor provides an opportunity to share experiences. I've been fortunate over the years to have many students return to share their experience and career success with me.   It's great to know that our students become respected colleagues who continue to move our profession forward.

# Instructional Techniques

- [Teaching Models](#)

- [Individualized Learning](#)

- [Workflow Considerations](#)

- [Comprehensive Online Preceptor Courses](#)

# Instructional Techniques: *Teaching Models*

## One-Minute Preceptor

https://www.youtube.com/watch?v=eRBdfXRj5N0

Published on Jul 26, 2016

Dr. Margaret Dow, M.D., Assistant Professor of Obstetrics and Gynecology, Mayo Clinic College of Medicine discusses a quick and easy method of approaching clinical teaching – The One Minute Preceptor model.

## Ask-Tell-Ask Feedback Model

*http://paeaonline.org/wp-content/uploads/2017/02/Ask-Tell-Ask-Feedback-Model.pdf*

## Introducing/Orienting a PA Student

*http://paeaonline.org/wp-content/uploads/2017/02/IntroducingOrienting-a-PA-Student.pdf*

## SNAPPS: A Six-Step Learning Centered Approach to Clinical Education
*http://paeaonline.org/wp-content/uploads/2017/02/SNAPPS.pdf*

*Resources:*

*Physician Assistant Education Association (PAEA)* http://paeaonline.org/

# Instructional Techniques: *Individualized Learning*

## Precepting Acute Care NP

*https://vimeo.com/118248470*

## Precepting Primary Care NP

*https://vimeo.com/118248476*

## Working with Overly Confident NP Students

*https://vimeo.com/118248471*

## Working with Overly Sensitive NP Students

*https://vimeo.com/118248472*

## Tailoring Clinical Teaching to an Individual Student

*http://paeaonline.org/wp-content/uploads/2017/02/Tailoring-Clinical-Teaching.pdf*

Resources:

Physician Assistant Education Association (PAEA) http://paeaonline.org/

The National Organization of Nurse Practitioner Faculties (NONPF) http://www.nonpf.org/?page=Preceptor_Vignettes

# Instructional Techniques:
## *Workflow Considerations*

## Incorporating Students into Patient Care Workflow

*http://paeaonline.org/wp-content/uploads/2017/02/Incorporating-Students-into-Patient-CareWorkflow.pdf*

## Precepting in a Busy Clinic Environment

https://vimeo.com/153056353

**Resources:**

Physician Assistant Education Association (PAEA) http://paeaonline.org/

The National Organization of Nurse Practitioner Faculties (NONPF) http://www.nonpf.org/?page=Preceptor_Vignettes

# Comprehensive Preceptor Courses

The following are more in depth preceptor education programs hosted on open-source platforms:

E-Tips for Practice Education

Developed by: Rosemin Kassam, B.Sc.Pharm., PharmD., ACP; Donna Drynan, M.Ed.,; Elizabeth MacLeod, M.Sc.; Lois Neufeld, RN; Glynnis Tidball, M.Sc.

Preceptor Education Program

Developed by: Kinsella, E.A., Bossers, A., Ferguson, K., Jenkins, K., Bezzina, M.B., MacPhail, A., Moosa, T., Schurr, S., Whitehead J., & Hobson, S. (2nd ed.)

Resources:
1. Kassam R, McLeod E, Kwong M, et al. An interprofessional Web-based resource for health professions preceptors. Am J Pharm Educ. 2012;76(9):168.
2. Supporting Nurse Practitioner Preceptor Development; Bazzell, Angela F. et al.; The Journal for Nurse Practitioners 2017 , Volume 04 , Issue 13 ,

# Student Use of the EMR

- Using the EMR can contribute to the students' educational experience and provides an opportunity to practice utilization of the record and documentation standards for their professional practice

- Utilizing History and Physical note templates may prompt learners to evaluate the patient systematically and ask more pertinent questions[1]

- From the Alliance for Clinical Education[2]:
  - Documentation in the patient's chart should be reviewed for content and format
  - Students should be exposed to the decision support offered in EHR systems
  - Students' work is not billable, so student documentation should be clearly shown as separate from the teaching provider

Resources:

1. Morrow J, Dobbie A. Using the Electronic Health Record to Enhance Student Learning; Family Medicine2010;42(1):14-5.).

2. Hammond MM et al. Medical Student Documentation in Electronic Health Records: A Collaborative Statement from the Alliance for Clinical Education. Teaching and Learning in Medicine. 2012; 24:257-266)

# Student Use of the EMR

Accessing the patient record:

- Ensure students have received training and a unique student log-in to access the EMR system

  [IU Health Policy IS 1.01:](#)

  - Personnel must never use another person's User ID to access IU Health resources

  - Personnel shall never allow others to access systems with their User ID, or disclose their password to anyone else (including IS) for any reason

- IUH Employees who are providing care in a student role should be accessing the EMR with their student position/access to the record

# Who do I contact to ask questions?

## Office of Clinical Education (OCE)

An IU Health system-wide program to help facilitate clinical placement of NP & PA students

- Students must register with our office by visiting https://iuhealthcpe.org/OCE and creating an account

- Students are expected to report any current or future clinical assignments, or submit preceptor requests on the OCE website. Students should keep their information updated and report any changes to clinical assignments or requests to the OCE staff.

- OCE assists with the educational affiliation agreements between IU Health and the college/university.

- If you have questions you may contact OCE at:
    Email:  oce@iuhealth.org
    Phone:  317-962-5048

# Additional Professional Development Resources

| Organization | Articles or Info | Comments |
|---|---|---|
| American Association of Nurse Practitioners (AANP)<br>https://www.aanp.org/ | AANP Preceptor Toolkit | ▪ Additional info on 'why' being a preceptor is important<br>▪ Professional Characteristics<br>▪ Barriers, Expectations, Qualities<br>▪ Strategies, Scheduling, Other |
| American Association of Physician Assistants (AAPA)<br>https://www.aapa.org/ | PA's are able to create an account to become a member | ▪ Practice Resources<br>▪ Federal & State Legislation Information<br>▪ Annual Conferences and More |
| Physician Assistant Education Association (PAEA)<br>http://paeaonline.org/ | One-Pagers for Preceptors<br>http://paeaonline.org/publications/preceptor-handbook/ | ▪ Preceptor Handbook & Resources<br>▪ Research<br>▪ Events, Professional Services, Other |
| Registered Nurses Professional Development Center (RNPDC)<br>http://www.rnpdc.nshealth.ca/ | Preceptor or Mentor – What's the difference? A Guide to Preceptorship & Mentoring Preceptorship Competencies | ▪ Mentoring<br>▪ Additional info on competencies<br>▪ Other Resources |
| American Academy for Preceptor Advancement<br>http://www.preceptoracademy.com/ | Stories from the Field | ▪ More preceptor stories & and other resources (must create an account for access) |
| Preceptor Education Program (PEP)<br>http://www.preceptor.ca/index.html | Create an account to access the modules<br>Click: 'Get Started', 'Enter Modules on OWL'<br>-Follow Instructions for creating an account | ▪ Multiple Resources and Professional Development opportunities for preceptors |
| Coalition of Advanced Practice Nurses of Indiana (CAPNI)<br>https://capni.enpnetwork.com/ | APP Nurses can become a member | ▪ A State of Indiana organization<br>▪ Events, Resources<br>▪ Political Updates, Other |
| The National Organization of Nurse Practitioner Faculties (NONPF)<br>http://www.nonpf.org | Preceptor Portal<br>http://www.nonpf.org/?page=PreceptorPortalMain | ▪ Preceptor Vignettes<br>▪ Preceptor Manual<br>▪ Policy Info/Updates<br>▪ Events and More |
| PLA: Indiana State Board of Nursing<br>http://www.in.gov/pla/nursing.htm | State Licensing Agency | ▪ Licensure and Compliance Info<br>▪ Other Resources |

# Brief Questionnaire

*Thank you for your participation*

- *Please click on the link below to answer a few questions about this toolkit.*

- *Your answers will assist the IUH Office of Clinical Education in the evaluation process and in making any necessary improvements.*

### https://www.surveymonkey.com/r/OCEtoolkit