

# **Preceptor Orientation Handbook:**

# Acknowledgements

**This handbook was developed by the Clinical Education Committee of the Physician Assistant Education Association.**

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## **Introduction**

We would like to take this opportunity to express our sincere gratitude to our preceptors for their hard work and dedication to this program and our physician assistant (PA) students. The clinical experiences the student will obtain in your office or clinic are of critical importance to a successful learning experience in the program. The clinical setting synthesizes

approach to further studies and therapy.

## **Preceptor Responsibilities**

Preceptor responsibilities include, but are not limited to, the following:

- x Orient students at the onset of the rotation with practice/site policies and procedures and review the expectations and objectives for the rotation
- x Provide ongoing and timely feedback regarding clinical performance, knowledge base, and critical thinking skills. This is done with the student informally each week and will be formally reported to the Director of Clinical Education by submitting mid-rotation and end-of-rotation evaluations
- x Supervise, demonstrate, teach, and observe clinical activities in order to aid in the development of clinical skills and ensure proper patient care
- x Delegate to the student increasing levels of responsibility for clinical assessment and management as appropriate to the student's experience and expertise
- x Participate in the evaluation of clinical skills and medical knowledge base through the following mechanisms:
  - o Direct supervision, observation, and teaching in the clinical setting
  - o Direct evaluation of presentations (including both oral and written)
  - o Assignment of outside readings and research to promote further learning
- x Dialogue with faculty during site visits to evaluate student progress and assist the learning process
- x Audit and co-sign charts in order to evaluate the student's ability to write appropriate and complete progress notes, histories, physical examinations, assessments, and treatment plans
- x Complete and promptly return the evaluation forms provided by the program reflecting on student knowledge and skills as well as their improvement throughout the rotation
- x Promptly notify the PA program of any circumstances that might interfere with the accomplishment of the above goals or diminish the overall training experience
- x Maintain an ethical approach to the care of patients by serving as a role model for the student
- x Demonstrate cultural competency through interactions with patients
- x Spend a few minutes each week in a candid discussion with the student as to whether each is meeting the other's needs and expectations, and what changes need to be made in the roles and relationship
- x Provide timely feedback to the student and the program regarding student performance

student fully matriculates through the educational program, the rotation the supervision is occurring by the preceptor and student have an existing personal relationship prior to the start of the rotation, a professional relationship must be maintained at all times in the clinical setting. Please consult the Director of Clinical Education regarding specific school or university policies regarding this issue.

### **Orientation and Communicating Student Expectations**

Orientation of the student to the rotation sites serves several purposes. Orientation facilitates a quicker transition in allowing the student to become a member of the medical team. It also establishes a feeling of enthusiasm and joining to the team as well as helping students develop the functional capability to work more efficiently.

On the first day of the rotation (or when possible, prior to the rotation), the student should take care of any administrative needs, including obtaining a name badge and computer password, and completing any necessary paperwork, EMR training, and site-specific HIPAA training, if needed.

Early on in the clinical rotation, it is recommended that the preceptor and student formulate mutual goals in regards to what they hope to achieve during the rotation. The preceptor should also communicate his or her expectations of the student during the rotation.

Expectations can include:

- x Hours
- x Interactions with office and professional staff
- x General attendance
- x Call schedules
- x Overnight/weekend schedules
- x Participation during rounds and conferences
- x Expectations for clinical care, patient interaction, and procedures
- x Oral presentations
- x Written documentation
- x Assignments
- x Write-ups
- x Anything additional that the preceptor feels is necessary

Students are expected to communicate with preceptors any special scheduling needs they may have during the rotation — in particular when they may be out of the clinical setting for either personal reasons or program-required educational activities. If students anticipate missing clinical time for personal reasons, they should alert the Director of Clinical Education well in advance of the clinic absence. (See the form “Site Adequacy for New Clinical Sites” for USA specific directives).



aspects of the visit. The preceptor must specifically document that the student was supervised during the entirety of the patient encounter. Medicare laws are slightly different in



the History of Present Illness (HPI), Physical Exam (PE), and all medical decision-making for proper billing. Following is a link to the Center for Medicare and Medicaid Services (CMS), which provides direct access to CMS rules regarding student documentation.  
<https://www.cms.gov/>

### **Prescription Writing**

Students may transmit prescribing information for the preceptor, but the physician must sign all prescriptions. More specifically, the student is not to appear on the prescription. For clinical rotation sites that use electronic prescriptions, the preceptor MUST log into the system under his/her own password and personally sign and send the electronic prescription. These guidelines must not be violated by the student or the preceptor.

### **Expected Progression of PA student**

PA students are trained to take detailed histories, perform physical examinations, give oral presentations of findings, and develop differential diagnoses. As the year continues, they should be able to more effectively come up with an assessment and plan, though this will involve discussion with the preceptor. If the preceptor determines necessary, students may be given

Preceptors should consider performing brief-of-rotation evaluations privately with colleagues and staff to get additional insight into the student's professionalism and effectiveness as a team player with all members of the health care team. These comments are helpful contributions to student evaluations. Additionally, staff feedback may enhance the student experience from one rotation to another and can help to improve efficiency and flow while also maximizing educational opportunities.

### **Feedback to Students**

It is imperative that students receive regula



## **Liability Insurance**

Each PA student is fully covered for malpractice insurance by the PA program. Students completing a formal elective rotation with a preceptor or site that may end up becoming an employer must maintain a “student” role in the clinic and should not assume responsibilities of an employee until after matriculation from the program. This includes appropriate, routine supervision with the preceptor of record and within the scope of the agreed-upon clinical experience. This is vital in preserving professional liability coverage provided by the university and is important to protect both the student and the employer in the case that legal action is sought by a patient. ***Even more critical is the occasional opportunity, or suggestion, from a potential employer to participate in patient-care activities outside of the formal rotation assignment prior to graduation. While these opportunities or to***

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- C. Providing Effective Feedback
  - x Getting Beyond “Good Job”: How to Give Effective Feedback
  - x Feedback in Clinical Medical Education
  - x Feedback: An Educational Model for Community-Based Teachers
- D. Managing Difficult Learning Situations
  - x Dealing with the Difficult Learning Situation: An Educational Monograph for Community-Based Teachers
  - x Provide Difficult Feedback: ~~FTS~~ for the Problem Learner
- E. Developing Expectations
  - x Setting Expectations: An Educational Monograph for Community-Based Teachers
- F. Conflict Resolution
  - x Aspects of Conflict Resolution

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# ***Appendix B***

## ***Evaluation and Teaching Strategies***

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# **Appendix E**

## ***Conflict Resolution***

### **Aspects of Conflict Resolution<sup>14</sup>**

This article discusses the causes of conflict, approaches to conflict resolution, and techniques/strategies to resolve conflict effectively.

<http://www.traqprogram.ca/index.php/en/resources/traq-library/item/303-aspects-of-conflict-resolution>

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Pace University Physician Assistant Program

University of Utah Physician Assistant Program

Yale University School of Medicine



Duke University Medical Center Community and Family Medicine. Characteristics of Constructive Feedback. Preceptor Handbook for Clerkship in Family Medicine <https://cfm.duke.edu/>