Assessment and Guidance for Experiential Education Community Pharmacy Site of Excellence Definition

Instructions: For each characteristic listed below, please indicate whether the pharmacy site Meets, Partially Meets, or Does Not Meet the criteria based on the provided descriptions. Thresholds are set by the institution and the definition is operationalized by them in a way that works best for their program. The guidance can be used by the schools and the sites for assessment and improvement. Schools may determine some factors to be "Critical factors" for the purposes of their assessments. Additionally, the Experiential Education Department should use student evaluation data to consider preceptor quality. Student perception of preceptor characteristics is vital to consider the potential impact of a preceptor. Consider data from the past 3–5 years.

Pharmacy Site Definition

The pharmacy site has a variety of direct patient care services, including non-dispensing clinical services, that are incorporated into normal pharmacy operational workflow and are supported by all pharmacy staff. The pharmacy demonstrates commitment to quality patient care through seeking patient feedback and conducting continuous quality improvement.

The pharmacy site has a positive culture with high team morale that provides a warm, welcoming, and inclusive learning environment for staff, students, and patients. Defined roles with shared responsibility and clear communication among all who interact inside and outside the pharmacy (e.g. patients, other healthcare providers, pharmacy staff, etc.) facilitates exceptional patient care.

The pharmacy site has a strong operational workflow with sufficient staffing, technology, and resources to support student learning, has support from leadership to have learners on site, and has staff who value lifelong learning and are supportive of teaching and mentoring students.

Learning Experiences Definition

The preceptor has leadership support to implement a structured learning experience. The learning experience includes a structured orientation with overall expectations and training on pharmacy processes. The learning experience has activities with clear, specific, measurable expectations that facilitate achievement of learning objectives. Activities and expectations are customizable based on each student's prior experiences, knowledge, skills, and interests to facilitate appropriate progression. The learning experience includes a structure for timely, specific, formal, and informal feedback.

The learning experience includes integration of dispensing and direct involvement in patient care activities (e.g., counseling, immunizations, disease state management, ensuring medication access) both in person and virtually. Activities allow for increasing responsibilities and autonomy throughout the experience, allowing students to move from observation to active participation even if for a portion of a complex task (including tasks reserved for pharmacists).

The learning experience affords students the opportunities to problem-solve independently on projects at all stages of pharmacy service implementation, participate in various pharmacy operations, management, and business activities, and learn how to follow all regulatory policies/procedures.

Preceptor Excellence Definition

The preceptor is inclusive, approachable, shows enthusiasm for teaching, and creates a positive, respectful, and conducive learning environment by demonstrating a genuine interest in student growth. The preceptor has a positive attitude toward and passion for the profession. The preceptor is committed to lifelong learning to best serve patients in the community with exceptional patient care and with strong understanding of pharmacy operations to advance practice efforts.

The preceptor demonstrates effective organization skills to maintain structure of the learning experience and provide thorough evaluations and fair assessments. To ensure all requirements and expectations are met for the learning experience, the preceptor maintains a positive and open relationship with the Experiential Learning Department at the College/School of Pharmacy.

The preceptor has sufficient time for direct interaction with and observation of students and engages in coaching and instruction, including offering guidance during activities and taking the time to explain processes in detail.

The preceptor is flexible in teaching methods to adapt to the level of student performance and learning style and maintains high, but reasonable, expectations and standards to appropriately challenge students.

The preceptor provides frequent, quality formal and informal feedback that is timely and specific, highlighting strengths and areas for improvement and encouraging innovative thinking and problem-solving in students. The preceptor demonstrates clear, effective and honest communication to facilitate self-reflection in students. The preceptor solicits and incorporates student feedback.

Assessment and Guidance of Pharmacy Site

Pharmacy Site Definition

The pharmacy site has a variety of direct patient care services, including non-dispensing clinical services, that are incorporated into normal pharmacy operational workflow and are supported by all pharmacy staff. The pharmacy demonstrates commitment to quality patient care through seeking patient feedback and conducting continuous quality improvement.

The pharmacy site has a positive culture with high team morale that provides a warm, welcoming, and inclusive learning environment for staff, students, and patients. Defined roles with shared responsibility and clear communication among all who interact inside and outside the pharmacy (e.g. patients, other healthcare providers, pharmacy staff, etc.) facilitates exceptional patient care.

The pharmacy site has a strong operational workflow with sufficient staffing, technology, and resources to support student learning, has support from leadership to have learners on site, and has staff who value lifelong learning and are supportive of teaching and mentoring students.

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Pharmacy Site Assessment Checklist

Characteristic	Meets	Partially Meets	Does Not Meet
Direct Patient Care Services: The pharmacy site incorporates a variety of direct patient care services, including non-dispensing clinical services, into its normal operational workflow.	☐	☐	☐
Staff Support for Clinical Services: All pharmacy staff members support the incorporation of direct patient care services.	☐	☐	☐
Commitment to Quality Patient Care: The pharmacy demonstrates a commitment to accessible patient care services through seeking patient feedback and continuous quality improvement activities.	☐	☐	☐
Positive Culture: The pharmacy site fosters a positive culture with high team morale. The pharmacy provides a warm, welcoming, and inclusive environment for staff, students, and patients.	☐	☐	☐
Leadership Support for Learners: Pharmacy leadership supports having learners on site.	☐	☐	☐
Defined Roles and Shared Responsibility: Roles within the pharmacy are defined, and there is a sense of shared responsibility among the team.	☐	☐	☐
Clear Communication (Internal & External): There is clear communication among all individuals interacting with the pharmacy (internal staff, patients, other providers, etc.).	☐	☐	☐
Strong Operational Workflow: The pharmacy site has a strong operational workflow.	☐	☐	☐
Sufficient Staffing, Technology and Resources: There is sufficient staffing to support student learning. The pharmacy has sufficient technology to support student learning. The pharmacy has sufficient resources to support student learning.	☐	☐	☐
Staff Value Lifelong Learning, Teaching and Mentoring: Pharmacy staff members value lifelong learning. Pharmacy staff members are supportive of teaching and mentoring students.	☐	☐	☐

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Guidance Document

Direct Patient Care Services

Dispensing Services (in addition to prescription review and filling):

▶ **Medication Synchronization:** Coordinating a patient's refills so that they can pick up all their medications at the pharmacy on a single day each month.

▶ **Compounding:** Preparing customized medications that are not commercially available in the required strength, dosage form, or contain specific ingredients tailored to a patient's needs. This can include sterile compounding (e.g., intravenous medications, eye drops) and non-sterile compounding (e.g., creams, ointments, oral liquids).

Preventive Care & Wellness Services:

▶ **Immunizations:** Administering a wide range of vaccines, such as influenza, COVID-19, shingles, pneumonia, tetanus, and travel vaccines.

▶ **Health Screenings:** Conducting screenings for conditions like blood pressure, blood glucose, cholesterol, and bone density.

▶ **Wellness Programs:** Offering programs focused on preventing chronic disease such as weight management, smoking cessation, and healthy lifestyle education.

Medication Management Services:

▶ **Medication Therapy Management** (**MTM**)**:** Pharmacist reviews of a patient's medications to identify and resolve drug-related problems, optimize medication regimens, and improve adherence. This includes: Comprehensive Medication Reviews (CMR), Targeted Medication Reviews, and Medication Reconciliation.

▶ **Medication Adherence Support:** Providing counseling, tools, and strategies to help patients take their medications as prescribed, including adherence packaging (e.g., blister packs) and medication synchronization.

▶ **Chronic Disease Management:** Collaborating with patients and other healthcare providers to manage conditions like diabetes, hypertension, asthma, and heart failure through education, monitoring, and medication adjustments (including under collaborative practice agreements).

▶ **Pharmacogenomics:** Offering genetic testing to help personalize medication selection and dosing based on an individual's genetic makeup.

Other Direct Patient Care Services:

▶ **Point-of-Care Testing:** Performing rapid diagnostic tests for conditions like strep throat, influenza, COVID-19, and HbA1c.

▶ **Prescribing under Collaborative Practice Agreements** (**CPAs**) **or Standing Orders:** Prescribing certain medications for specific conditions (e.g., contraception, smoking cessation aids, minor infections) within their scope of practice.

▶ **Transitions of Care Services**: Helping patients manage their medications when moving between different healthcare settings (e.g., hospital to home).

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▶ **Home Visits:** Visiting patients in their homes to provide medication management or other clinical services.

▶ **Telehealth Services:** Providing consultations and medication management remotely through phone or video calls.

▶ **Opioid Risk Assessment and Naloxone Dispensing:** Identifying patients at risk of opioid overdose and providing education and naloxone.

▶ **Addressing Social Determinants of Health:** Screening for and connecting patients with resources to address factors like food insecurity, housing, and transportation that can impact their health.

▶ **Care Coordination and Referral:** Providing referrals to other healthcare providers and active assistance for patients to receive care from other healthcare providers.

Staff Support for Clinical Services (in addition to baseline expectations)

Key Principles for All Staff:

▶ **Understanding the Scope of Their Role:** Knowing what tasks they are qualified and legally allowed to perform in support of clinical services.

▶ **Teamwork:** Collaborating effectively with pharmacists and other staff members to ensure smooth and efficient service delivery.

▶ **Ongoing Training and Professional Development:** Participating in training programs to enhance their knowledge and skills related to clinical services.

Pharmacy Technicians:

▶ **Gathering Patient Information:** Collecting essential patient information before a clinical service, such as reason for visit, allergies, medication lists, insurance details, and contact information. This streamlines the pharmacist's workflow.

▶ **Assisting with Point-of-Care Testing and Screenings:** Performing the physical act of running tests (e.g., blood glucose checks, strep tests) or administering questionnaires under the pharmacist's supervision and according to established protocols.

▶ **Preparing for Immunizations:** Organizing vaccine supplies, preparing the injection area, and ensuring necessary paperwork is completed before and after administration.

▶ **Managing Inventory for Clinical Services:** Ensuring adequate stock of vaccines, testing supplies, educational materials, and other resources needed for clinical services.

▶ **Scheduling Appointments:** Managing the appointment calendar for clinical services, sending reminders to patients, and coordinating follow-up.

▶ **Processing Billing for Clinical Services:** Understanding the billing codes and procedures for different clinical services and accurately processing claims.

Front-End Staff/Pharmacy Aides:

▶ **Managing Phone Calls and Inquiries:** Answering basic questions about available clinical services and directing more complex inquiries to the pharmacist or technician.

▶ **Assisting with Paperwork:** Helping patients complete necessary forms for registration or consent for clinical services.

▶ **Processing Payments:** Handling payments for services.

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Commitment to Quality Patient Care (in addition to baseline expectations):

▶ **Culture of Emphasizing Patient Safety:** A strong emphasis on accuracy and safety in all aspects of dispensing and patient care is evident in the team's actions and conversations.

▶ **Error Reporting and Analysis:** A non-punitive system is established for reporting medication errors and near misses, followed by thorough analysis to identify root causes and implement preventative measures.

▶ **Regular Staff Training and Competency Assessments:** All staff are well-trained, competent in their roles, and participate in ongoing education and competency assessments.

▶ **Seek, Analyze, and Utilize Feedback from Patients:** Patient feedback via various mechanisms is encouraged, analyzed for improvement opportunities, and feedback is communicated with all staff along with an action plan to implement changes. When possible and appropriate, follow up with patients who provided feedback to let them know what actions have been taken because of their input.

▶ **Regular Review of Policies and Procedures:** Review and update of pharmacy policies and procedures are scheduled regularly to ensure they align with best practices and promote quality care.

▶ **Participation in External Quality Programs:** The pharmacy is engaged in voluntary accreditation or quality improvement programs offered by professional organizations or regulatory bodies.

Positive Culture:

▶ **Respect and Appreciation:** the contributions of all team members, regardless of their role, are recognized and appreciated. Personal challenges are met with understanding and empathy. Team members actively listen to each other's perspectives and opinions, and interactions are consistently respectful, even during stressful situations. Accomplishments, big and small, are celebrated.

▶ **Leadership and Management:** Managers and owners demonstrate the values and behaviors they expect from their team. Policies and procedures are applied fairly and consistently across all staff members, and leaders are approachable.

▶ **Overall Atmosphere:** There's a generally positive and enthusiastic atmosphere within the pharmacy. Staff breaks are honored, and schedules are accommodated as needed for personal needs. Staff receive training on cultural humility and implicit bias, and staff feel comfortable reporting discrimination or microaggressions without retaliation. The environment is accessible for various languages and accessibility levels.

Leadership Support for Learners:

▶ **Allocating Sufficient Time for Teaching and Mentoring:** Leaders recognize that precepting requires time and adjust staffing or workflow to allow pharmacists to adequately supervise and teach learners.

▶ **Valuing the Contribution of Learners:** Leaders foster a culture where learners are seen as valuable members of the team who can contribute to patient care under appropriate supervision.

Defined Roles and Shared Responsibility:

▶ **Clear Roles and Responsibilities:** Each staff member understands their specific duties and responsibilities within the workflow.

▶ **Cross-Training:** Staff are trained in multiple roles, fostering a better understanding of each other's responsibilities and increasing flexibility within the team.

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Clear Communication (Internal & External):

▶ **Open Communication & Shared Problem-Solving:** Staff feel comfortable sharing ideas, concerns, and feedback with each other and with management without fear of reprisal. When challenges arise (e.g., a complex insurance issue, a medication shortage), the team works together to find solutions. Staff members willingly assist colleagues, even if it's outside their direct responsibilities.

▶ **Effective Internal Communication:** Clear and efficient communication methods (e.g., intercoms, instant messaging, shift huddles) are utilized to keep the team informed.

▶ **Seamless Handoffs:** The pharmacy has clear procedures for transferring tasks or information between staff members during shift changes or when assisting each other.

▶ **Effective Communication with Prescribers:** The pharmacy maintains open and collaborative communication with physicians and other healthcare providers to ensure coordinated patient care.

▶ **Referral to Other Healthcare Professionals:** Pharmacy staff recognize when a patient's needs exceed the pharmacy's scope of practice and make appropriate and effective referrals.

▶ **Effective Counseling:** Pharmacists provide clear, concise, and patient-friendly counseling on new and refill prescriptions, including proper usage, potential side effects, storage instructions, and interactions. Patients are involved in decisions about their medication therapy and care plans, and the pharmacist takes their preferences and values into account.

▶ **Active Listening and Empathy:** Staff are trained to actively listen to patient concerns, show empathy, and address their questions and anxieties respectfully.

▶ **Culturally Competent Care:** Staff are trained to provide care that is sensitive to patients' diverse cultural backgrounds, beliefs, and language needs (e.g., providing translated materials, using interpreter services).

▶ **Patient Education Resources:** The pharmacy provides access to reliable and understandable information on medications, disease states, and wellness topics (e.g., brochures, websites, support group referrals).

Strong Operational Workflow

Prescription Processing, Filling, Verification and Dispensing:

▶ **Organized Prescription Management:** The pharmacy employs a clear system for tracking prescriptions from intake to dispensing (e.g., using workflow software, color-coded bins) to prevent lost or delayed orders. The pharmacy effectively utilizes technological solutions to improve speed and accuracy.

▶ **Effective Inventory Management:** A well-organized and easily accessible inventory system is employed that allows staff to quickly evaluate medication availability, track inventory levels, and efficiently manage inventory.

▶ **Standardized Operating Procedures (SOPs):** Written protocols exist for core processes like prescription medication filling, verification, patient counseling, medication inventory, and other clinical patient care services. The pharmacy develops and adheres to evidence-based protocols for the delivery of clinical services (e.g., immunization administration, blood pressure measurement, MTM process).

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Integration of Clinical Services Workflow:

▶ **Dedicated Consultation Space:** The pharmacy has a designated private or semi-private area for patient consultations, immunizations, and other clinical services. This ensures patient privacy and a professional environment.

▶ **Scheduled Appointments and Walk-Ins:** There are established, clear procedures for scheduling clinical service appointments (e.g., vaccinations, MTM) while also accommodating walk-in requests where feasible and appropriate.

▶ **Streamlined Documentation:** Pharmacy staff effectively utilizes efficient systems (often integrated within the pharmacy software) for documenting clinical encounters, patient assessments, interventions, and outcomes. This ensures accurate record-keeping and facilitates follow-up.

▶ **Defined Roles and Responsibilities for Clinical Services:** The pharmacy clearly outlines which staff members are responsible for various aspects of clinical service delivery (e.g., scheduling, pre-assessment paperwork, assisting during the service, billing).

▶ **Integration with Dispensing Workflow:** Communication and information flows seamlessly between the dispensing and clinical service areas (e.g., identifying patients eligible for MTM during prescription processing or scheduling follow-up appointments after a clinical encounter).

▶ **Efficient Billing and Reimbursement for Clinical Services:** Clear procedures are established for billing and processing payments or insurance claims for clinical services provided.

Sufficient Staffing, Technology and Resources

Sufficient Staffing:

▶ **Adequate Pharmacist Coverage:** Enough pharmacists are scheduled to oversee dispensing, conduct verifications, provide patient counseling, perform clinical services (like immunizations and MTM), and supervise students without being constantly rushed or overwhelmed.

▶ **Appropriate Technician-to-Pharmacist Ratio:** Employing an adequate number of certified and trained pharmacy technicians to handle tasks like prescription filling, inventory management, third-party billing, and assisting with clinical services under pharmacist supervision. This allows pharmacists to focus on patient-centered care and clinical activities.

▶ **Dedicated Support Staff:** Front-end staff or pharmacy aides are used to manage tasks like answering phones, managing the cash register, and assisting with administrative tasks. This frees up pharmacists and technicians to focus on dispensing and clinical care.

Sufficient Technology:

▶ **Automation Where Appropriate:** Automation technologies are implemented (e.g., dispensing robots, automated refill reminders) to improve efficiency and reduce manual errors.

▶ **Robust Pharmacy Management System:** The pharmacy uses a comprehensive software system that efficiently handles prescription processing, inventory management, billing, patient profiles, drug utilization reviews, and documentation of clinical services.

▶ **Point-of-Care Testing Devices:** Pharmacy staff has access to reliable and user-friendly devices for conducting on-site tests like blood glucose monitoring, blood pressure checks, influenza tests, and strep tests, where clinical services include these.

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- ▶ **Telehealth Capabilities:** The pharmacy utilizes secure video conferencing or other telehealth platforms to conduct virtual consultations, medication therapy management sessions, or follow-up with patients remotely.
- ▶ **Electronic Health Integration:** Electronic health records or platforms integrate with service delivery (e.g., MTM platforms).

Sufficient Resources:

- ▶ **Adequate Physical Space:** The pharmacy has enough space for dispensing operations, patient counseling (including a private consultation room), clinical service administration (e.g., immunization area), inventory storage, and a designated workspace for learners.
- ▶ **Necessary Equipment and Supplies:** The pharmacy has functioning equipment (e.g., counting trays, balances, refrigerators with temperature monitoring, computers, printers) and adequate supplies (e.g., vials, labels, syringes, alcohol swabs) for dispensing and clinical services.

Staff Value Lifelong Learning, Teaching and Mentoring:

- ▶ **Pharmacists Actively Seeking Continuing Education (CE):** Pharmacists go beyond the minimum required CE hours, attending webinars, conferences, and workshops on emerging therapies, disease state management, and new clinical guidelines.
- ▶ **Technicians Pursuing Advanced Certifications:** Pharmacy technicians voluntarily pursue advanced certifications (e.g., sterile compounding, medication history) to enhance their skills and knowledge base.
- ▶ **Support for Preceptor Development:** Pharmacists serving as preceptors are provided resources and training materials to effectively mentor and teach students. Leaders acknowledge the important role of preceptors in shaping the next generation of pharmacists.
- ▶ **All Staff Contributing to a Positive Learning Environment:** Staff members create a welcoming and supportive atmosphere where learners feel comfortable asking questions and making mistakes. They are approachable and willing to offer assistance.
- ▶ **Acting as Role Models:** All staff members demonstrate professionalism, ethical behavior, and a strong commitment to patient care, serving as positive role models for learners.

Assessment and Guidance of Learning Experience

Learning Experiences Definition

The preceptor has leadership support to implement a structured learning experience. The learning experience includes a structured orientation with overall expectations and training on pharmacy processes. The learning experience has activities with clear, specific, measurable expectations that facilitate achievement of learning objectives. Activities and expectations are customizable based on each student's prior experiences, knowledge, skills, and interests to facilitate appropriate progression. The learning experience includes a structure for timely, specific, formal, and informal feedback.

The learning experience includes integration of dispensing and direct involvement in patient care activities (e.g., counseling, immunizations, disease state management, ensuring medication access) both in person and virtually. Activities allow for increasing responsibilities and autonomy throughout the experience, allowing students to move from observation to active participation even if for a portion of a complex task (including tasks reserved for pharmacists).

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The learning experience affords students the opportunities to problem-solve independently on projects at all stages of pharmacy service implementation, participate in various pharmacy operations, management, and business activities, and learn how to follow all regulatory policies/procedures.

Learning Experience Checklist

Characteristic	Meets	Partially Meets	Does Not Meet
Leadership Support: The preceptor has leadership support to implement a structured learning experience.	☐	☐	☐
Structured Orientation: The learning experience includes a structured orientation with overall expectations and training on pharmacy processes.	☐	☐	☐
Experiential Activities: The learning experience has activities with clear, specific, measurable expectations that facilitate achievement of learning objectives.	☐	☐	☐
Experience Customization: Activities and expectations are customizable based on each student's prior experiences, knowledge, skills, and interests to facilitate appropriate progression.	☐	☐	☐
Feedback: The learning experience includes a structure for timely, specific, formal, and informal feedback.	☐	☐	☐
Integration into Workflow: The learning experience includes integration of dispensing and direct involvement in patient care activities both in person and virtually.	☐	☐	☐
Student Autonomy and Skill Development: Activities allow for increasing responsibilities and autonomy throughout the experience, allowing students to move from observation to active participation even if for a portion of a complex task. The learning experience affords students the opportunities to problem-solve independently on projects at all stages of pharmacy service implementation	☐	☐	☐
Projects & Business Management Experience: The learning experience has students participate in various pharmacy operations, management, and business activities, and learn how to follow all regulatory policies/procedures.	☐	☐	☐

Guidance

Leadership Support

▶ **Ongoing Communication is Evident:** The preceptor maintains consistent and clear communication with staff and pharmacy administrators regarding student activities, projects, and responsibilities. Approval processes involving administrators are followed when applicable.

▶ **Roles and Expectations are Clearly Defined:** Staff members are aware of their roles in the student's learning experience, including responsibilities such as shadowing, project support, and workflow adjustments. Pharmacy administrators are informed of any changes to workflow due to the rotation.

▶ **Support Resources are Utilized:** The preceptor has requested and/or received appropriate support from pharmacy administration to enhance the student's learning experience.

▶ **Support from Pharmacy School:** The preceptor has access to resources supporting structuring and implementing a high-quality learning experience from the school or college of pharmacy.

Structured Orientation

▶ **Orientation Plan is Documented:** A structured plan for the initial days of the rotation is documented, including activities, expectations, and anticipated skill development.

▶ **Key Personnel are Introduced:** The student has been introduced to relevant staff members and their roles within the pharmacy.

▶ **Workflow Training is Provided:** The student receives training on pharmacy operations, including staff roles, workflow areas, and software systems. Time is allotted for acclimation.

▶ **Orientation Materials are Provided:** The preceptor supplies a calendar, assignment due dates, and a site-specific syllabus.

▶ **Student Goals are Incorporated:** The student's learning goals are discussed during orientation and revisited during formal evaluations.

Experiential Activities

▶ **Learning Objectives are Clearly Defined:** The student is provided with specific learning objectives aligned with workflow or project-based experiences.

▶ **Activity Lists and Rubrics are Available:** The preceptor provides a list of activities with due dates and clear guidelines, including rubrics or guides to clarify expectations.

▶ **Schedule Includes Project Time:** The student's schedule includes dedicated time for completing daily tasks and assigned projects.

▶ **Resources are Provided:** The student is given access to or directed toward appropriate resources to support activity completion and understanding.

▶ **Innovative Thinking is Encouraged:** Activities assigned by the preceptor promote critical thinking and problem-solving.

▶ **Projects are Aligned with Learning Objectives:** The preceptor assigns projects that support the student's learning goals and expose them to unique aspects of community pharmacy.

▶ **Opportune Projects are Utilized:** The preceptor identifies and assigns relevant, unplanned projects that arise during the rotation.

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▶ **Participation in Service Development is Supported:** The student is encouraged to contribute to the assessment, implementation, or evaluation of new service lines.

▶ **Networking and Advocacy:** Students are introduced to professional advocacy initiatives affecting the pharmacy and given an opportunity to participate in those initiatives if relevant. Students are invited to participate in networking activities with the pharmacist or offered professional networking support.

Experience Customization

▶ **Student Background is Considered:** The preceptor conducts a discussion during orientation to assess the student's prior experience and comfort level in community pharmacy.

▶ **Rotation is Tailored to Student Needs:** The preceptor adapts the rotation activities and teaching methods based on the student's background to optimize learning outcomes. Optional learning activities are available for those students demonstrating mastery of basic skills.

▶ **Pre-Rotation Self-Assessment is Used:** The preceptor collects information on the student's prior experience, knowledge, and confidence through a self-assessment tool.

Feedback

▶ **Regular Check-ins Occur:** The learning experience is structure to include daily or weekly check-ins based on the student's level of independence and comfort to address questions or concerns promptly.

▶ **Formal Evaluations are Scheduled:** Formal evaluations are scheduled in advance of rotation starting and dates provided to student in orientation

Integration into Workflow

▶ **Orientation Period is Provided:** The student is given sufficient time (typically one week) to adjust to the pharmacy environment, software, and staff.

▶ **Student Integration in Workflow is Facilitated:** The student is given opportunities to practice all aspects of the dispensing processes, including those reserved for pharmacists in a structured manner.

▶ **Student Involvement in Direct Patient Care:** Students are introduced to all pharmacy clinical service lines, including those integrated in the dispensing process. Students participate in some or all clinical service provision as appropriate based on student skill level and learning experience structure.

Business Management Experience

▶ **Collaboration with Management Occurs:** The preceptor coordinates with pharmacy management or ownership to identify potential student projects, including niche areas.

▶ **Exposure to Business Development:** The learning experience includes student participation in or observation of the development, implementation, or evaluation of business strategies, financial implications, or marketing efforts. This may include contributing to promotional campaigns, assessing patient engagement strategies, reviewing reimbursement data, or proposing new services based on community needs.

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Assessment and Guidance of Preceptor Excellence

Preceptor Excellence Definition

The preceptor is inclusive, approachable, shows enthusiasm for teaching, and creates a positive, respectful, and conducive learning environment by demonstrating a genuine interest in student growth. The preceptor has a positive attitude toward and passion for the profession. The preceptor is committed to lifelong learning to best serve patients in the community with exceptional patient care and with strong understanding of pharmacy operations to advance practice efforts.

The preceptor demonstrates effective organization skills to maintain structure of the learning experience and provide thorough evaluations and fair assessments. To ensure all requirements and expectations are met for the learning experience, the preceptor maintains a positive and open relationship with the Experiential Learning Department at the College/School of Pharmacy.

The preceptor has sufficient time for direct interaction with and observation of students and engages in coaching and instruction, including offering guidance during activities and taking the time to explain processes in detail.

The preceptor is flexible in teaching methods to adapt to the level of student performance and learning style and maintains high, but reasonable, expectations and standards to appropriately challenge students.

The preceptor provides frequent, quality formal and informal feedback that is timely and specific, highlighting strengths and areas for improvement and encouraging innovative thinking and problem-solving in students. The preceptor demonstrates clear, effective and honest communication to facilitate self-reflection in students. The preceptor solicits and incorporates student feedback.

Preceptor Assessment Checklist

Characteristic	Meets	Partially Meets	Does Not Meet
Professionalism: The preceptor shows enthusiasm and passion for the pharmacy profession and maintains a positive and respectful demeanor.	☐	☐	☐
Preceptor Expertise: The preceptor is committed to professional development and demonstrates expertise in pharmacy operations and contributes to practice advancement.	☐	☐	☐
Attitude: The preceptor demonstrates inclusivity, approachability, and enthusiasm for teaching, and they express a genuine interest in student growth and development.	☐	☐	☐
Learning Environment: The preceptor creates a supportive and conducive learning environment that encourages student participation and growth.	☐	☐	☐
Instruction and Coaching: The preceptor instructs students well and encourages innovative thinking and problem solving.	☐	☐	☐

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Communication: The preceptor communicates clearly, effectively, and honestly with students.	☐	☐	☐
Institutional Engagement: The preceptor maintains a positive and open relationship with the Experiential Learning Department and ensures all requirements and expectations are met.	☐	☐	☐
Feedback and Evaluations: The preceptor provides frequent, timely, and specific feedback, facilitates student self-reflection, and conducts thorough and fair evaluations.	☐	☐	☐

Guidance

Professionalism

▶ **Passion for the profession and precepting:** Examples include:

- Active participation in a community-pharmacy focused local, regional, state, and/or national pharmacy organization
- Active, positive representation of community pharmacy practice at the college or school of pharmacy
- Recognition for excellence in precepting by the college or school of pharmacy
- Positive evaluations from students in the area of professionalism
- The preceptor has volunteered to serve as a preceptor rather than been compelled

▶ **Modeling professional behavior:** The preceptor effectively models professional behaviors and treats students as future professional colleagues.

▶ **Advocates for the Profession:** The preceptor actively engages in professional advocacy activities.

Preceptor Expertise

▶ **Expertise and practice advancement:** The preceptor demonstrates expertise in pharmacy operations and contributes to practice advancement. Examples include:

- Leadership role in creation or implementation of a new clinical or operational service
- Implementing a quality improvement intervention
- Coaching or mentoring a colleague
- Training others in addition to pharmacy students

▶ **Continuing Professional Development:** The preceptor actively seeks out continuing education regarding common areas of practice, precepting, or other gaps in knowledge and uses Continuous Professional Development process effectively.

▶ **Advanced Practice:** The preceptor is actively practicing at the top of their scope of practice

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Attitude: In this area, it is useful to review student evaluations to assess student perception of the preceptor's attitudes.

▶ **Respect:** The preceptor respects and values diverse opinions and backgrounds.

▶ **Inclusivity:** The preceptor creates an inclusive environment where all students feel welcome.

▶ **Enthusiasm:** The preceptor makes the learning experience engaging and motivating.

▶ **Leadership:** The preceptor demonstrates positive leadership skills.

Learning Environment Management:

▶ **Learning Experience Management:**
  - The preceptor uses other pharmacy staff (including support staff) to provide instruction in their areas of expertise
  - The preceptor maintains high, yet reasonable, expectations to challenge students appropriately.
  - The preceptor demonstrates effective organizational skills to manage the learning experience.

▶ **Positive Learning Environment:** The student works in close physical proximity to the preceptor, especially during patient encounters to facilitate observation and feedback. The preceptor assists students in identifying emotional responses to situations and developing appropriate coping skills.

▶ **Learning Experience Quality Improvement:** The primary preceptor actively reviews and assesses performance using student evaluations and uses student feedback to implement changes in the rotation experience to improve quality.

Instruction and Coaching:

▶ **Excellence in Instruction:** The preceptor demonstrates ability to effectively explain complex concepts, offers clear, detailed explanations of processes and activities, and checks for student understanding.

▶ **Excellence in Coaching:** The preceptor constructs plans to help students achieve goal competency level if not meeting expectations.

▶ **Observation and Engagement:** The preceptor directly interacts with and observes students and engages in active, goal-oriented coaching through learning experiences.

Communication:

▶ **Clear Communication:** The preceptor clearly communicates instructions and expectations, encourages questions and dialogue, and gives explicit instructions on what is completed independently and the procedure for following up on independent tasks.

▶ **Expectations are Clearly Communicated:** The preceptor has communicated clear expectations to the student regarding daily/weekly tasks, conduct, dress code, and learning activities.

▶ **Adaptable Communication Methods:** The preceptor works with students to determine effective communication methods and plan and then actively and consistently follows the communication plan.

▶ **Communication Expectations:** The preceptor provides guidance about appropriate time and means to reach the preceptor and when to expect responses.

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- ▶ **Communication Style:** The preceptor is specific and kind in delivering feedback.
- ▶ **Excellent Documentation:** The preceptor consistently documents feedback provided using site specific rubrics and/or rubrics provided by experiential education department. (i.e. provides good comments, etc)

Institutional Engagement:

- ▶ **Meets Institutional Needs:** The preceptor is knowledgeable about required learning objectives from both school of pharmacy and national accreditation. The preceptor is timely in submission of required documentation for all experiential learning.
- ▶ **Active Engagement:** The preceptor actively engages with the Experiential Learning faculty and staff in both required communication and situations warranting institutional support. The preceptor may also serve in an advisory role for the Experiential Learning department.

Feedback and Evaluations:

- ▶ **Objectivity:** Preceptor evaluates students on competencies defined by school of pharmacy based on objective criteria.
- ▶ **Feedback Delivery:** Most formative feedback and formal evaluations are provided face-to-face.
- ▶ **Timeliness:** Feedback is provided in real-time after completion of each activity and/or prior to the student completing the activity again.
- ▶ **Encourages Self-Assessment:** Preceptor feedback includes an aspect of student self-assessment.

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