



UAB Physician Assistant Studies Program

CLINICAL PRECEPTOR ORIENTATION HANDBOOK

Guidance for Physician Assistant Studies Preceptors



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UAB Physician Assistant Studies Program Mission

“The mission of The University of Alabama at Birmingham Physician Assistant Studies Program is to attract and train culturally diverse individuals with the knowledge, skills, and judgment needed to provide competent and compassionate healthcare to all.”

Introduction

Thank you for your commitment to PA education. Your dedication to the medical learners at UAB is truly an investment in the future of healthcare. Patient encounters and clinical experiences that students are exposed to in your area of expertise are essential to their successful transition from didactic education, to practicing clinicians in the medical field. As a clinical preceptor, you have tremendous influence on the learners that you welcome to your medical team. Your supervision and instruction play an irreplaceable role as each learner develops the skills and clinical judgment necessary to become champions of quality patient-care. The UAB PA program values our preceptors and the time and effort dedicated to the students’ clinical education. Thank you for being a part of our team!

General Goals of the Clinical Year

Every medical provider remembers the years spent as a student learner in the clinical realm. It is a difficult transition from the theoretical classroom setting to the hands-on learning environment of caring for patients, but such training is critical to becoming a competent, compassionate evidence-based medical provider. To this end, the goals of the clinical year include:

- Apply didactic knowledge to supervised clinical practice
- Develop and sharpen clinical reasoning skills
- Expand and refine the medical fund of knowledge
- Perfect the art of history taking and physical examination skills
- Sharpen and develop oral presentation and written documentation skills
- Form an understanding of the PA role in health care delivery
- Develop the interpersonal skills and professionalism necessary to function as part of a medical team
- Prepare for the Physician Assistant National Certifying Exam (PANCE)

Physician Assistant Competencies

“The clinical role of PAs includes primary and specialty care in medical and surgical practice settings. Professional competencies for physician assistants include the effective and appropriate application of medical knowledge; interpersonal and communication skills; patient care; professionalism; practice-based learning and improvement; systems-based practice; as well as an unwavering commitment to continual learning, professional growth, and the physician-PA team for the benefit of patients and the larger community being served. These competencies are demonstrated within the scope of practice, whether medical or surgical, for

each individual physician assistant as that scope is defined by the supervising physician and appropriate to the practice setting.” -NCCPA

Definition of Preceptor Role

Preceptors will guide learners in various settings in regards to clinical reasoning skills, history taking, physical examination, effective communication, physical diagnosis, documentation, presenting patients, and development of patient-centered assessments and plans.

Preceptor Responsibilities

- Acquaint students with expectations and objectives of the rotation.
- Acquaint students with policies and procedures associated with the clinical practice site/facility.
- Provide students with an appropriate learning environment in which they will have a variety of patient encounters and learning experiences.
- Provide students with the opportunity to assess patients, perform history and physical examinations, order and interpret diagnostic tests, and assist in prescribing therapeutic and non-therapeutic treatment measures, as defined by the specific rotation objectives.
- Direct student encounters toward patients that present with disorders that are common to the field of General Surgery, the community, and scope of the Physician Assistant practice.
- Instruct, teach, demonstrate, observe, and supervise students while completing clinical practice activities, in an effort to develop the appropriate knowledge, skills, and behavior needed to provide appropriate patient care in the scope of practice aligned with the field of General Surgery.
- Participate in the development and evaluation of the student’s skills and medical knowledge through the following mechanisms:
 - Direct observation in the clinical setting.
 - Assignment of additional readings and research to promote further learning.
 - Audit charts to evaluate the student’s ability to write appropriate and complete medical histories and physical examinations, progress notes, assessments, and treatment plans.
 - Provide ongoing, constructive feedback to the student regarding their performance.
 - Communicate with program faculty in a timely manner regarding a student’s lack of performance and/or progress.
- Complete a mid-rotation evaluation and final evaluation of the student’s performance.
- Avoid placing students in a position of authority or responsibility that exceeds their level of knowledge or skill.

The Preceptor–Student Relationship

The preceptor should maintain a professional relationship with the student and adhere to appropriate professional boundaries at all times. Social activities and personal relationships outside of the professional learning environment should be carefully selected so as not to put the student or preceptor in a compromising situation. Contact through social networking websites (e.g., Facebook, Instagram, Twitter) should be avoided until the student graduates or completes the rotation where supervision is occurring. If 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.

Orientation and Communicating Student Expectations

Orientation of the student to the rotation site 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 belonging to the team which helps students develop the functional capability to work more efficiently.

On the first day of the rotation (or 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 additional *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 expectations of the student during the rotation to include:

- Dress Code
- Hours
- Interactions with office and professional staff
- General attendance
- Call schedules
- Overnight/weekend schedules
- Participation during rounds and conferences
- Expectations for clinical care, patient interaction, and procedures
- Oral presentations
- Written documentation
- Assignments
- 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 — such as 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 preceptor and director of clinical education well in advance of the clinic absence.

Many sites find it helpful to create their own written orientation manual, which is given to the student prior to the first day of the rotation. Creating such a site-specific orientation/policy manual can be delegated to the students you host, with each subsequent student adding to a document that you as the preceptor maintain and edit.

Preparing Staff

The staff of an office or clinic has a key role in ensuring that each student has a successful rotation. By helping the student learn about office, clinic, or ward routines and the location of critical resources, they help a student become functional and confident. Students, like their preceptors, depend on staff for patient scheduling and assistance during a patient's visit. Students should communicate with the staff about procedures for making appointments, retrieving medical records, bringing patients into examination rooms, ordering tests, retrieving test results, and charting.

The preceptor should inform the staff about how the student will interact with them and with patients. Consider having a meeting or creating a memo in advance of the student's arrival to discuss:

- Student's name
- Student's schedule
- Student's role in patient care
- Expected effect of the student on office operation:
 - Will fewer patients be scheduled?
 - Will the preceptor be busier?
 - Will other providers participate in the student's learning?

Supervision of the PA Student

During a student's time at the clinic or hospital, the preceptor must be available for supervision, consultation, and teaching, or designate an alternate preceptor. Although the supervising preceptor may not be with a student during every shift, it is important to clearly *assign* students to another MD, DO, or PA or NP who will serve as the student's preceptor for any given time interval. Having more than one clinical preceptor has the potential to disrupt continuity for the student but also offers the advantage of sharing preceptorship duties and exposes students to valuable variations in practice style. In the case where supervision is not available, students may be given an assignment or spend time with ancillary staff (x-ray, lab, physical therapy, etc.), as these experiences can be very valuable. The preceptor should be aware of the student's assigned activities at all times.

Students are not employees of the hospitals or clinics and must work entirely under the preceptor's supervision. Students are not to substitute for paid clinicians, clerical staff, or other workers at the clinical sites. On each rotation, it is the student's responsibility to ensure that the preceptor sees all of the student's patients. The preceptor can provide direct supervision of technical skills with gradually increased autonomy in accordance with the student's demonstrated level of expertise. However, every patient must be seen and every procedure

evaluated prior to patient discharge. The preceptor must document the supervision of the PA student in the care of the patient in all aspects of the visit. The PA student will not be allowed to see, treat, or discharge a patient without evaluation by the preceptor.

Informed Patient Consent Regarding Student Involvement in Patient Care

The patients are essential partners in student education. All efforts will be made to observe strict confidentiality, respect for patient privacy and dignity, and honor of preferences regarding treatment. All students complete HIPAA training prior to their clinical year. However, patients must be informed that a PA student will participate in their care, and the patient's consent must be obtained. This may be done through standardized forms at admission or on a person-by-person basis. If the patient refuses the PA student's services, the request must be honored. Patients must know that the student is not a replacement for their regular provider, but rather, partnering with the provider in their care.

Documentation

PA students may enter information in the medical record. Students are reminded their documentation is legal and contributory to the medical record. All medical entries must be identified as "student" and must include the PA student's signature with the designation "PA-S." Preceptors are required to review and verify all student documentation. Electronic medical record (EMR) utilization is a very important and necessary skill for students to practice during their clinical training. However, if students are not given training or access to an institution's EMR system, students are encouraged to hand-write notes, which should be reviewed by preceptors whenever possible for feedback.

Prescription Writing

Students may transmit prescribing information for the preceptor, but the preceptor must sign all prescriptions. The student's name 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.

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 with appropriate work-ups. As the year continues, students will mature in their ability to effectively develop an assessment and plan. As the preceptor feels more comfortable with the student's skills and abilities, the student should be given progressively increasing supervised autonomy. For example, if the preceptor deems it necessary, students initially may observe patient encounters. However, by the end of the first week, students should actively participate in evaluating patients.

Student Evaluation

The evaluation is designed to promote communication between preceptor and student. Preceptors are encouraged to discuss strengths and weaknesses so as to encourage students about their strengths as well as provide opportunities to improve upon weaknesses. The evaluation should also reflect on student knowledge and skills as well as their improvement

throughout the rotation, and assess progress in comparison to other students at the same level. The preceptor's evaluation of the student is tremendously important and a passing evaluation from the preceptor is mandatory on all core and elective rotations. Core rotations in the PA profession as determined by ARC-PA include family medicine, internal medicine, emergency medicine, pediatrics, women's health, behavioral medicine and general surgery. If deemed "not passing," the student may be requested to repeat the rotation or undergo remediation procedures specified by the program. Students earning an "Unsatisfactory" on any of the professional standards on the evaluation will automatically fail the rotation. The final grade for a clinical rotation and the decision to pass or fail a student are ultimately made by the program faculty.

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

Feedback to Students

While students may have only one formal evaluation during the clinical rotation, it is imperative that they receive regular positive and constructive feedback on a daily basis from their preceptors to help improve their clinical performance.

Student Responsibilities

In addition to adhering to the standards of professional conduct outlined in the handbook, students are expected to perform the following during their clinical rotations:

- Ensure attendance is timely.
- Be readily available to clinical preceptors during working hours established by the preceptor, including on-call hours and weekends.
- Attend clinical rotations as scheduled by the preceptor, in addition to grand rounds, lectures, and conferences, if made available to the student. Students are scheduled to return to campus on the last Thursday and Friday of each rotation for knowledge and skills assessments as well as board review and professional development presentations.
- Contribute to the efficiency and effectiveness of the preceptor's clinical practice by performing all delegated tasks in a timely and appropriate manner.
- Display professional behavior that enhances the preceptor's clinical practice and reflects positively on the Physician Assistant profession.
- Inform preceptors in a timely manner of individual needs, concerns, or problems that have the potential of interfering with the delivery of patient care or the effectiveness and efficiency of the preceptor's practice.
- Maintain an open line of communication and meaningful dialogue between preceptors, fellow student learners, and program faculty.

- Be sensitive to the demands placed on clinical preceptors, including complicated aspects of patient care, continuing education requirements, community service, research, and time commitments associated with training a wide variety of student learners.

Standards of Professional Conduct

As health care practitioners, PAs are required to conform to the highest standards of ethical and professional conduct in regards to:

- Respect
- Flexibility
- Academic integrity
- Honesty and trustworthiness
- Accountability
- Cultural competency

PA students are expected to adhere to the same ethical and professional standards required of certified PAs. Violations of standards of conduct are subject to disciplinary actions administered by the UAB PA program. If preceptors observe any concerns about a student's professionalism, please contact the clinical coordinator immediately.

Specific Program Policies

Please refer to the [UAB PA Program Handbook](#) for program-specific policies on:

- Workers' Compensation
- Drugs and alcohol
- Timeliness and lateness
- Needle stick procedure
- HIPAA training
- Blood-borne pathogens training
- Immunization requirements
- Background check
- Drug testing
- Sexual harassment and assault resources

The [U.S. Department of Education's Office of Civil Rights](#) provides information about federal laws that protect students against racial, sexual, or age discrimination.

The Preceptor–Program Relationship

The success of clinical training of PA learners depends on maintaining good communication with the PA student, preceptors, and the clinical coordinators. All members of the team should share contact information.

If a preceptor has a concern about a student, they should contact the director of clinical education or clinical coordinator. The program strives to maintain open faculty–colleague

relationships with preceptors. When problems arise during a rotation, notifying appropriate program personnel early will ensure that those issues can be resolved without unduly burdening the preceptor. In addition, early, open communication may help avoid a diminution in the student's educational experience.

UAB PA Programs Responsibilities

- Orient preceptors and students to the policies and procedures of the clinical year
- Develop and maintain clinical rotation sites that affords students a quality educational experience
- Evaluate student rotations through regular site visits and open communication with clinical preceptors
- Provide malpractice coverage for students during rotations
- Attempt to anticipate student problems before they arise, and provide support, guidance, and encouragement to students throughout the clinical year
- Provide seminars that augment clinical experiences and increase the student's medical and surgical knowledge and technical skills

Liability Insurance

Each PA student is fully covered for malpractice insurance by the UAB PA program. Students completing a rotation with a preceptor or site that may become an employer must maintain a "student" role in the clinic and should not assume responsibilities of an employee until after matriculation in order to preserve the professional liability coverage provided by UAB. It is also important to protect both the student and the employer in the case that legal action is sought by a patient. Any opportunity, even from a potential employer, to participate in patient-care activities outside of the formal rotation prior to graduation must be avoided as UAB's liability coverage does not cover the student in these circumstances. Likewise, if a student is working in a paid position in a different health-care related capacity during their PA education, that person is not permitted to assume the role of a PA student while on duty as a paid employee. Liability insurance will not cover any student assuming the "PA student" role outside of an assigned clinical rotation, including shadowing opportunities.

Preceptor Resources

Links to topics are included below and can also be accessed on the PAEA website at: www.PAEAonline.org, under Preceptors and also under Faculty Resources.

- A. Introducing a PA Student to Patient Care
 - [Orienting a PA Student to Your Practice](#)
 - [Incorporating Students into Workflow](#)
- B. Evaluation and Teaching Strategies
 - [The One-Minute Preceptor](#)
 - [Tailoring Clinical Teaching to an Individual Student](#)
 - [Six-Step Learner-Centered Approach to Clinical Education](#)

C. Providing Effective Feedback

- [Ask-Tell-Ask Feedback Method](#)

Closing Remarks

Thank you for your commitment to the clinical education of the UAB PA students. Please do not hesitate to contact our clinical team with any questions.

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