



# Cleveland Clinic

School of Pharmacy Technology

## PRECEPTOR HANDBOOK



**The Preceptor Difference**



# Cleveland Clinic

School of Pharmacy Technology

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Dear Preceptor,

Thank you for participating in the Cleveland Clinic's School of Pharmacy Technology program. Your willingness to work with students demonstrates your commitment to the mission of the Cleveland Clinic and the Department of Pharmacy. I am proud and excited to share our students with the Department of Pharmacy, and thank you for the opportunity.

As students embark on their externships, they will look to you for guidance, opportunities, and leadership. As a preceptor, you have a unique opportunity to help shape a student's new career in pharmacy. If you have spent time precepting students in the past, you know how rewarding and challenging the role can be. While you are a skilled and professional member of the Cleveland Clinic Pharmacy staff, you might not have much experience teaching and/or mentoring students. This is an area of expertise that has expectations that not every member of the staff has experience.

This training has been developed to outline expectations, offer guidance and provide expertise to enhance the experiences of the preceptors involved in this program. Completion of this training is mandatory for all preceptors along with the Academic and Professional Record form and membership to and verification of all professional organizations.

This training has been developed in compliance with American Society of Health-System Pharmacists (ASHP) recommendations. Included in this training you will find this Preceptor Handbook, Understanding the Failing or Faltering Student pdf., SOPT Preceptor Training Powerpoint Presentation, ASHP Guidelines for Ambulatory pdf. and ASHP Guidelines for Hospital. Please use this guide to assist you, and reach out to me with any questions, concerns, or barriers.

Any questions or issues regarding the program, students, and/ or training, please contact:

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### SCHOOL OF PHARMACY TECHNOLOGY OVERVIEW

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#### **Mission:**

The mission of the Cleveland Clinic School of Pharmacy Technology is to educate, train, and prepare students for careers in pharmacy technology at the Cleveland Clinic.

#### **Vision:**

The vision of the Cleveland Clinic School of Pharmacy Technology, in collaboration with the Department of Pharmacy is to provide didactic and experiential training to develop students into contributing members of the Cleveland Clinic Enterprise; to develop a pharmacy technology program with local, state, and national recognition; and to contribute to the development and growth of allied health professions.

#### **Values:**

*Teamwork:* The School of Pharmacy Technology, in collaboration with the Department of Pharmacy, Cleveland Clinic Institutes, and leaders in allied health education will provide education and oversight to students in support of Cleveland Clinic's mission.

*Integrity:* The School of Pharmacy Technology is committed to academic integrity, professional conduct, and the responsibility to support the values of Cleveland Clinic & the Department of Pharmacy.

*Quality:* The School of Pharmacy Technology will provide superior training and education that ensures the provision of safe and optimal drug therapy outcomes in patients, as supported by the mission of the Department of Pharmacy.

*Commitment:* The School of Pharmacy Technology, the Department of Pharmacy, and the Cleveland Clinic are committed to the education, development, and placement of pharmacy technicians within the Cleveland Clinic Enterprise.

#### **Program Goals:**

- Recruit candidates that will positively represent the program and excel academically
- Prepare students for employment with the Cleveland Clinic Health-System
- Achieve, local, state, and national program recognition
- Provide a superior level of clinical training to technician students

## OVERVIEW OF PRECEPTOR TRAINING

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### Training Modules

- Module 1 – Preceptor Role
- Module 2 – Role Model
- Module 3 – Educator Role
- Module 4 – Facilitator Role
- Module 5 – Evaluator Role
- Module 6- Preceptor Expectations
- Module 7- Student Scope of Practice
- Module 8- Student Expectations
- Module 9- Schedule
- Module 10- Student Goals

### Preceptor Training

Preceptors are vital to the success of the School of Pharmacy Technology program and to our students. It is important that all preceptors are equipped to deal with the multifaceted role preceptors are required to provide.

This training provides a description of the various roles of the preceptor, expectations of the preceptor, a structure that prepares the preceptor for their role, and resources available to help preceptors meet the challenges they may face. If a preceptor has a question or concern when working with a student, please contact the program director, who is available to coach and offer advice in this area.

### Learning Outcomes

- Understand what it means to be a preceptor.
- Understand what makes an effective preceptor.
- Understand how being a preceptor makes someone a role model.
- Understand what it means to be an educator.
- Determine ways to educate each student in order to help them succeed.
- Understand the purpose of the student's training.
- Understand the different ways to facilitate learning and growth in reluctant students.
- Understand what it takes to be a good evaluator.
- Understand the expectations of preceptors and students.
- Understand the scope of work students are legally allowed to do.
- Know the policies governing a student during the externship.
- Develop a training schedule for the student.
- Understand the duties required by preceptors for the School of Pharmacy Technology.



### MODULE 1: PRECEPTOR ROLE

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What is a preceptor? Simply put, a preceptor is a person who guides a student, is a source of information, and can give the student real life information on what the job entails on a day to day basis.<sup>1</sup> As a preceptor, you are investing in a student's future in pharmacy. Your student will depend on you to learn the necessary skills to advance in pharmacy practice, secure employment, and obtain appropriate certifications.

Precepting is a practice that provides students the opportunity to apply the concepts and techniques that were learned within the classroom. This is also a time for the students to develop their own attitudes, values, and approach to patient care through the preceptor model.

Characteristics of highly effective preceptors include:<sup>2</sup>

- Enthusiasm for teaching
- Organization
- Encouraging critical thinking
- Encouraging problem solving
- Facilitating knowledge base development
- Integrating students into the work flow
- Good communication skills
- Reflection upon learning and teaching
- Role Model

A preceptor will be the last key piece to successfully transitioning the pharmacy technician to the clinical world of pharmacy. This is an opportunity for you to give back to the students and repay those who have invested in your future.<sup>3</sup>

Preceptors do not necessarily need to teach every skill themselves. However, as a preceptor, you should expect to arrange training with various members of your department, and follow up with the student to discuss the experience. Preceptors should be patient, explaining how a process works *and* why it's done.

As a preceptor, you will learn valuable leadership skills that can help you advance professionally. The Cleveland Clinic and the Department of Pharmacy highly values education, and acknowledge your commitment to our efforts.



### MODULE 2: ROLE MODEL<sup>4</sup>

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Being a mentor and being a preceptor are two different definitions, in the fact that preceptor-student relationships are prearranged short-term commitments, unlike a mentorship. However, the benefit from both relationships is similar. Students are able to gain knowledge and clinical expertise and preceptors are able to do what they enjoy, which is teaching. Because of this similarity, being a preceptor involves mentoring and thus being a role model.<sup>5</sup>

Areas specifically that a pharmacist or pharmacy technician can be a role model at work include:<sup>6</sup>

- Providing patient-centered pharmaceutical care
- Ethical decision making
- Patient care problem solving
- Providing medication, diseases, and health education to patients
- Professional and patient care behavior

These areas encompass all areas that a role-model practitioner can excel and teach their students appropriately.

At the end of the day, a preceptor should act and perform in a manner that exhibits professionalism and accountability. Although this seems second nature at this point, this is a prime example of how to be an effective role model for the student.



### MODULE 3: EDUCATOR ROLE

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It is often human nature to apply the same teaching strategies that you, as a student, received while learning to become a pharmacist or pharmacy technician. However, each student learns differently and different strategies should be utilized to individualize the learning process.

Different techniques can be used to precept students. Examples include case discussions, matching students with specific situation for learning experience, direct questioning, think aloud sessions, assignment of direct readings, coaching and cheerleading, and direct observation.<sup>7</sup>

An interesting technique to educating students is by using the “One Minute Preceptor” model. Although this may take longer than one minute, it allows the preceptor to understand student’s critical thinking pattern. There are five microskills/questions used to understand where the student stands in their education. These include:<sup>8</sup>

- What do you think is going on? (get a commitment)
- What led you to that conclusion? (probe for supporting evidence)
- Many times when... (teach general rules)
- You did an excellent job of... (reinforce what was right)
- Next time this happens, try... (correct mistakes)

Ultimately, we would like the pharmacy technicians to thrive in their career choice. The Cleveland Clinic Department of Pharmacy adopted a pharmacy technician career ladder in order to allow for this to happen. After the student has graduated from the school of pharmacy technology, our hope is for them to climb the ladder quickly, and we will need your education expertise to help with this, particularly with the competency aspect.

The career ladder consists of 3 levels (outlined below) ranging from entry level technician to a certified, highly skilled technician. Technicians who start their careers with the department will be eligible for advanced after 12 month, based on time, performance evaluation, competency assessment, and an application/portfolio process.

- Pharmacy Technician I- entry level position for newly hired employees without certification; focus is mainly filling of medication orders, delivery of medications and filling automated dispensing cabinets
- Pharmacy Technician II- can choose two paths in the second step:
  - Repackaging/triage/non-sterile compounding- focuses on answering incoming phones to assist with missing doses, forwarding phone calls to appropriate individuals, using automated systems to repackage bulk pharmaceuticals into unit of use packaging
  - Decentralized- focuses on assisting with pharmacy services to the nursing unit floors, assisting the NUBP, and providing bedside delivery services
  - Controlled drug- focuses on assisting the maintenance of disposition records for all controlled substances and ensuring the security of the control drug area by observing the operation of the automated control drug storage





- Pharmacy Technician III- focuses on the preparation of sterile products which includes selecting appropriate supplies for production and prioritizing production to meet patient needs
- Outpatient Pharmacy Technician- performs all necessary functions to support the including order intake, review and procession, computerized order entry, order filling, triaging of phones, point-of-sale transactions, third party payer coordination, and inventory replenishment

The objectives set during the rotation and the ultimate goal of the pharmacy technician will determine which areas will need specific focus.



### MODULE 4: FACILITATOR ROLE

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Ultimately, as a preceptor, the goal is to guide the student in the right direction and facilitate active learning. This is a difficult task to push on someone who is uncomfortable with the idea of actively pursuing their own education, and, therefore, a facilitator role is needed.<sup>9</sup>

As a preceptor, it is crucial to engage students in the active learning process, in order to encourage the expressing of opinions and the sharing of knowledge and experiences to facilitate the next step of their learning process. There are several ways to go about directing learning through constructive feedback that include:<sup>5</sup>

- Identifying and responding to each students specific learning needs
- Challenging the learning process in each student
- Coaching the behavior through effective constructive and timely feedback
- Making teaching an important focus of the practice site
- Treating students as colleagues-in-training



### MODULE 5: EVALUATOR ROLE

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A preceptor is required to be an evaluator, in order to formally and accurately assess the student's performance. Understanding how to effectively evaluate a student will help you build your leadership skills. Providing constructive feedback to students takes practice. The students need to understand, through positive and supportive methods, when they need to make changes in their processes. Providing weekly feedback to the students will get easier with practice. Focus on the things that they did well, and provide examples how they can improve. Remember that your perception of the student is also a direct reflection on you.

As an evaluator, the preceptor must give constructive feedback to the student's efforts. A good evaluation should be encouraging and helpful, while avoiding extremes. Self-evaluation is also paramount to success for the student. Score accurately. Scoring high to avoid a crucial conversation doesn't help you grow as a leader– and doesn't help the student develop necessary skills. Scoring the student low without providing feedback for improvement is discouraging for the preceptor and the student.

The evaluator will not only need the curriculum's competencies, but will also need the students' personal goals for the experience. Although the licensing exam will be able to evaluate a student's minimum competencies, only the one teaching and observing the student perform their duties will be able to evaluate if this student will make a good health care employee.

Evaluations are either done at the midpoint and/or at the end of the experience; however, good experiences involve incorporating assessments within the entirety of the time spent together. For example, this includes giving full appreciation for a job well done. There are several key items that involve "praise" that we may not always think of:<sup>10</sup>

- Don't just say "Good Job"- be specific
- Do it on the fly- only takes minute
- Do it often but truly mean what you say
- Put it in writing

This will ultimately allow for increasing motivation and more experiential learning.



### MODULE 6: PRECEPTOR EXPECTATIONS

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The role of the preceptor is challenging and rewarding. Please keep the following in mind:

- Be patient. Explain, in detail, why you're performing tasks. Try to remember the first time you worked in a pharmacy, and don't assume the student understands all the terms, systems, and technology in place.
- Play the part! The students are excited to embark on a new career path. You were selected as a preceptor because you represent our organization and department well. Remember to uphold the mission, vision, and values of the Cleveland Clinic.
- Be available to the student. If you're not scheduled to work on a day the student will be in the pharmacy, identify a trainer for the day. The student and the designee should understand what the expectations for the day will be.
- Provide timely feedback to the student. Share your weekly evaluation with the student and set aside time to answer questions.
- Preceptors should work closely with their managers to discuss the growth achieved through mentorship, and the resources required to support students. Remember that the Cleveland Clinic's School of Pharmacy Technology is fully operated and supported by the Department of Pharmacy. Don't be afraid to ask for help when you need it!



### MODULE 7: STUDENT SCOPE OF PRACTICE

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Cleveland Clinic School of Pharmacy Technology students are enrolled in a training program recognized by the Ohio State Board of Pharmacy. Under Ohio Revised Code 4729.42, Division B, Section 1-3, students participating in a board recognized program may perform the duties of a pharmacy technician for up to 210 days before obtaining certification. This clause allows CC SOPT students to function as a technician, with proper training and guidance for the duration of their externship.

Students are expected to undergo initial orientation and training, and practice with minimal assistance before the end of the externship, under the direct supervision of a licensed pharmacist.



### MODULE 8: STUDENT EXPECTATIONS

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Students are expected to follow all policies and procedures in place at each practice site. These expectations include, but are not limited to: call-off procedures, professional conduct, smoking & substance abuse policies, dress code, and use of cellular devices. Any immediate concerns should be forwarded to the student's on-site preceptor, who should follow up any incidents with the Cleveland Clinic's School of Pharmacy Technology Program Director.



### MODULE 9: SCHEDULE

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Students are scheduled for 10 weeks of externship, split into 5-week inpatient and ambulatory rotations. Students have an agreed schedule totaling 40 hours per week, and will be back in the classroom on Thursdays from 2:30pm - 4:30pm. Those two hours, along with travel time, are included in their 40 hours per week.

Planned absences must be confirmed by the program director. Call offs must follow site procedure *and* students must notify the program director. Students are only allowed 2 missed days for the entire duration of the externship, which does *NOT* include the day they sit for the PTCE exam.

#### First Day Orientation:

- Meet the student in a designated area and show them to the work area
- Introduce yourself and the members of your pharmacy team
- Explain a typical day in the pharmacy
- Show the student the location of:
  - Restrooms
  - Lockers
  - Cafeteria
  - ATM

#### Weekly (by Thursday):

- Students must complete weekly evaluations
  - Review the evaluation with the student and reflect on opportunities to improve as a preceptor and leader
- Preceptor must complete weekly evaluations
  - Review your evaluation ***with the student*** and provide constructive feedback. Please do not do this evaluation without the student present, and be completely open and honest with them about their performance. This is one of the most important tools the student has at their disposal to initiate personal growth.

#### End of Externship:

- Preceptor completes student evaluation
  - Review your evaluation with the student and provide constructive feedback
- Student completes externship reflection assignment
  - Review the evaluation with the student and provide them with feedback as they progress in their pharmacy career.
- Provide the student with your contact information for future questions



### MODULE 10: STUDENT GOALS

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#### **Goal 1:**

**Obtain necessary skills and training to function independently, under the supervision of a licensed pharmacist, in the practice setting.**

As a preceptor, you should encourage the consistent progression of skills so that the technician student can function as a contributing member of the pharmacy team.

#### **Goal 2:**

**Obtain the necessary skills to obtain pharmacy technician certification.**

Students will be sitting for the PTCE sometime during externship. Encourage their study habits, check in often to ensure that they are provided with adequate opportunities to learn necessary skills, and arrange review with pharmacists and technicians within your department.

#### **Goal 3:**

**Train pharmacy technicians that are highly skilled that we can retain within the department.**

Focus on training technicians that you would want to work with in the future. The goal is to retain talent within the department – so train your future co-workers in a way that builds your team!





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<sup>3</sup> Barker ER, Pittman O. Becoming a super preceptor: a practical guide to preceptorship in today's clinical climate. J Am Acad Nurse Pract. 2010 Mar;22(3):144-9.

<sup>4</sup> Wensel TM. Mentor or preceptor: what is the difference? Am J Health Syst Pharm. 2006 Sep 1;63(17):1597.

<sup>5</sup> <http://www.aacp.org/resources/education/appi/documents/exemplaryypes.pdf>

<sup>6</sup> Barker ER, Pittman O. Becoming a super preceptor: a practical guide to preceptorship in today's clinical climate. J Am Acad Nurse Pract. 2010 Mar;22(3):144-9.

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<sup>8</sup> Kleffner, J. (1998, June). Becoming an Effective Preceptor. Retrieved from <https://www.utexas.edu/pharmacy/general/experiential/practitioner/becoming.pdf>

<sup>9</sup> Joan Lloyd, Consultant and Speaker, Tips on Giving Praise