

## **Evaluation**

### **Setting Expectations –**

#### **I. Orientation**

##### **Introduction**

For the community preceptor, teaching is not a full-time job. When there are long periods of time between precepted rotations, it can take a few days to get back into the routine of teaching. Yet those first days of a rotation are critical for helping a learner adapt to a new practice environment and a new preceptor.

Developing a system for orienting and clarifying expectations with a learner can help each rotation get off to a good start. While the first day of a rotation (usually Monday) is almost always hectic, taking the time to orient the learner on that first day saves the preceptor time and energy the rest of the rotation by preventing learner mistakes and unintended transgressions of office norms. A systematic orientation also helps a preceptor tailor the rotation to different learners' particular needs. And it provides a framework for giving learners feedback and evaluating them.

This series of documents will briefly explore the four steps of setting expectations:

- 1) Orienting learners to the logistics of the practice and rotation,**
- 2) Setting expectations of the learner's performance,
- 3) Selecting mutually-agreeable rotation objectives, and
- 4) Providing feedback about whether they are meeting the set expectations.

##### **Example**

It is Tuesday evening and you are catching up on paperwork. On your calendar you see that you have a third-year medical student coming Monday for a four-week rotation, Lisa Jones.

Several months ago, the arrival of your last student coincided with a particularly busy morning at the hospital. You were delayed getting into the office and the student spent an hour reading magazines in the waiting room. You were pleased with his clinical skills, but as you filled out his evaluation form at the end of the rotation, you realized you had not observed him in some of the categories listed on the form. When you asked for his feedback about the rotation, you were surprised to hear he had wanted learn more about managing chronic back pain; this request would have been easy to meet had you known his interest.

##### **Orientation**

Before learners can focus on learning objectives and developing clinical skills, they need to know their way around your office. Where can they leave their belongings? How do they use the phone? A systematic orientation helps learners promptly answer these initial questions so that they can focus on the main purpose of the rotation.

### **Introduction to the Practice**

- Learner work space, reference materials
- Dress code: name tag? lab coat? how formal?
- Hours & days patient care is provided at practice
- Parking, phone system, and mail
- Staff introductions and roles
- Unique learning opportunities (clinical activities, patient population, provider interests)

### **Introduction to the Community**

- Community characteristics, community resources
- Where to buy groceries, do laundry, etc.
- For example, your learner might be likely to see many repetitive-motion injuries because of the chicken-processing plant down the road. If the closest battered women's shelter is two hours away; he or she might have to learn about alternative resources for patients experiencing domestic violence.

### **Overview of the Rotation**

How rotation fits into learner's career plans -- Helping learners find relevance can enhance their enthusiasm for the rotation and their motivation.

### **Introduction to the Learner**

- Rotations completed
- Experience and skills mastered
- Areas needing work
- A one-page form can help learners outline their background, identify the rotations they have completed, and describe their interests – in general, clinically speaking, and specific to the rotation

The learner's skills, attitudes, and level of knowledge can best be assessed in the first few days of the rotation by observing the learner working with a patient directly (either in person, or less intrusively, through video monitoring). Learners' case presentations also provide some of this information in their omissions or additions of extraneous information.

### **Orienting Efficiently**

One strategy for efficiently covering these various topics is to enlist the aid of your staff in orienting learners. Who in your office might best give a tour of the facility, introduce staff and

their various roles, and show the learner how to use the phone? Do you have patients that might enjoy showing a learner around the community? The more these orientation responsibilities are shared, the less work for you and the more aware and invested your office staff and community members are in the learner's education.

Introducing the learner to the practice can start before the learner arrives. Some preceptors choose to send in advance a “site description” of their practice that includes the name, address, and phone number of the practice; providers' names; a paragraph describing the mission, patients served, and procedures done at the practice; directions to the practice; and instructions regarding who to report to on the first day of the rotation and at what time.

### **References**

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