



Tips for Preceptors to Actively Engage Trainees in the Ambulatory Primary Care Setting

1

Develop Objectives / Goals

Prior to the clinic, assist in developing 1–3 learning objectives/goals for the clinic (i.e. practicing physical exam maneuvers, suggesting next steps/medical decision making, presentations) and share your note template with the trainee.

2

Encounter Planning Prior to Patient Visits

Participate in encounter planning immediately prior to the patient visits –

- A** Set the trainee up for success by sharing insight into the patient's story, motivations, and support system.
- B** **Ask...** "What are some questions you may ask based on *<reason for visit>* to the patient to rule out more emergent situations?"
- C** **Ask...** "What are some Review of Systems questions that would be important to ask for *<condition>?*"

3

Models for Incorporating Students Into the Clinical Encounter

- A** Have the trainee conduct concurrent visits with the preceptor (preceptor can complete one or more visits while the trainee conducts the basic components of another visit) and take ownership of the care for 1–2 patients each clinic.



Ask the trainee to present the patient in the room in front of patient to limit redundancy by combining the presentation of the patient by the trainee with the confirmation of the story by the patient.

- B** Directly observe the trainee gathering the HPI or other specific portion of the history taking in the room while the preceptor acts as the trainee's scribe for that portion of the encounter.
- C** Ask the trainee to directly engage in the encounter with the preceptor by asking a focused review of systems for the concern at hand.

4

Updating Problem and Medication Lists

During the visit, ask the trainee to update the problem and medication lists.

5

Verify Health Maintenance Status

If the patient only has 1 or 2 concerns, ask the trainee to verify health maintenance status (i.e. immunizations, colon cancer screening, mammogram, PAP smear).

6

Pend Required Orders and Prescription Refilling

Encourage the trainee to pend orders that they think may be required and prescriptions needing refilled.

7

Write the SOAP note

Challenge the trainee to write the SOAP note for 1–2 patients each clinic and review them at the end of the clinic (*Bonus! your note will be done!*).

8

Demonstrate Physical Exam Maneuvers

Use the physical exam time to demonstrate 1–2 important physical exam maneuvers on each patient, especially if the physical exam is abnormal.

9

Always Start Feedback with the Trainee's Self-assessment

Always start feedback with the trainee's self-assessment. "How do you think it went today?"

Focus feedback by asking if/how they achieved their 1–3 learning objectives/goals for the clinic.

10

Debrief with the Trainees

Debrief with the trainees and receive feedback on the techniques you used to *<hopefully>* enhance their learning during the clinic.

Content Reference: M. Keating & S. Harper, 2019



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