



Preceptor Assessment Guidelines 2024-2025 Academic Year

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Preceptor Evaluation Likert Scale Response Options Guide

To assess OMS III medical students' clinical care performance across various domains, including history-taking, physical examination, differential diagnosis, diagnostic tests, treatment plans, documentation, oral presentations, resource utilization, urgent care recognition, procedural skills, medical knowledge, and patient culture of quality and safety, the following can be used:

- 1. Obtains an Appropriate History:**
 - Below Expectations: Frequently misses key elements in patient history.
 - Meets Expectations: Gathers relevant information effectively.
 - Exceeds Expectations: Obtains a comprehensive history with attention to detail.
 - Exemplary: Skillfully elicits nuanced patient history, including social and psychological aspects.
- 2. Performs an Appropriate Physical Examination:**
 - Below Expectations: Demonstrates inconsistencies or lacks thoroughness.
 - Meets Expectations: Conducts a systematic and comprehensive physical exam.
 - Exceeds Expectations: Performs advanced maneuvers and accurately interprets findings.
 - Exemplary: Conducts physical exams with exceptional skill, precision, and sensitivity.
- 3. Formulates an Appropriate Differential Diagnosis:**
 - Below Expectations: Provides a limited or inaccurate list of differential diagnoses.
 - Meets Expectations: Generates a reasonable list based on history and examination.
 - Exceeds Expectations: Considers rare or complex diagnoses and ranks differentials effectively.
 - Exemplary: Constructs a differential diagnosis incorporating multiple perspectives and evidence-based reasoning.
- 4. Recommends and Interprets Diagnostic Tests:**
 - Below Expectations: Struggles to choose appropriate tests or misinterprets results.
 - Meets Expectations: Orders and interprets common tests accurately.
 - Exceeds Expectations: Utilizes diagnostic tests judiciously and integrates results into clinical context.
 - Exemplary: Demonstrates advanced understanding of diagnostic modalities and their implications.
- 5. Recommends an Appropriate Treatment/Management Plan:**
 - Below Expectations: Proposes ineffective or inappropriate management strategies.
 - Meets Expectations: Develops evidence-based treatment plans aligned with diagnoses.
 - Exceeds Expectations: Considers alternative treatments and anticipates potential complications.
 - Exemplary: Designs comprehensive management plans with consideration for patient preferences and cost-effectiveness.
- 6. Documents an Acceptable Clinical Note:**
 - Below Expectations: Fails to document essential information or lacks clarity.

- Meets Expectations: Records relevant details concisely and accurately.
 - Exceeds Expectations: Creates well-organized and thorough clinical notes.
 - Exemplary: Produces detailed notes demonstrating exceptional communication skills and professionalism.
- 7. Provides an Organized Oral Presentation of Clinical Case:**
- Below Expectations: Presents information in a disorganized or incomplete manner.
 - Meets Expectations: Delivers a structured and coherent oral presentation.
 - Exceeds Expectations: Articulates complex cases clearly and engages the audience effectively.
 - Exemplary: Delivers presentations with confidence, clarity, and persuasive argumentation.
- 8. Demonstrates the Ability to Access Appropriate Resources:**
- Below Expectations: Struggles to locate relevant information or uses unreliable sources.
 - Meets Expectations: Utilizes standard references and databases effectively.
 - Exceeds Expectations: Demonstrates proficiency in accessing and critically evaluating medical literature.
 - Exemplary: Applies advanced research skills to gather comprehensive and up-to-date medical information.
- 9. Participates and Collaborates as a Respectful and Helpful Member of an Interprofessional Team:**
- Below Expectations: Demonstrates poor teamwork, lacks respect for colleagues, and is uncooperative.
 - Meets Expectations: Engages effectively with team members, respects diverse perspectives, and contributes to team goals.
 - Exceeds Expectations: Actively collaborates, fosters a positive team environment, and supports colleagues' contributions.
 - Exemplary: Demonstrates exceptional teamwork, promotes interdisciplinary collaboration, and serves as a role model for professionalism.
- 10. Recognizes a Patient Requiring Urgent or Emergent Care:**
- Below Expectations: Frequently overlooks critical patient conditions or delays action.
 - Meets Expectations: Identifies urgent cases promptly and initiates appropriate interventions.
 - Exceeds Expectations: Responds adeptly to emergent situations and collaborates effectively with the care team.
 - Exemplary: Demonstrates exceptional clinical judgment and leadership in urgent care scenarios.
- 11. Performs General Procedures of a Physician:**
- Below Expectations: Struggles with procedural skills or lacks proficiency.
 - Meets Expectations: Performs common procedures competently and safely.
 - Exceeds Expectations: Demonstrates advanced procedural skills with precision and confidence.
 - Exemplary: Executes complex procedures with expertise and ensures patient comfort and safety.
- 12. Approaches patient care with a whole person approach (body, mind, and spirit) as part of managing patient's medical issues:**
- Student Doctor does not use a whole person approach with patient care.
 - Fails to ask about the patient's emotional state or mental health.
 - Ignores social determinants of health such as living situation, family support, or financial concerns.
 - Does not consider or discuss the patient's beliefs, values, or spiritual practices.
 - Student Doctor uses a whole person approach with constant prompting.
 - Occasionally asks about mental health or social factors, but only after being prompted by a supervisor.
 - Needs reminders to consider the patient's emotional and spiritual needs during consultations.

- Shows a basic awareness of the importance of a holistic approach but struggles to apply it independently.
- Student Doctor uses a whole person approach with minimal prompting.
 - Regularly asks about and addresses mental health, emotional well-being, and social factors, though may occasionally overlook these aspects until prompted.
 - Generally, considers and integrates the patient's beliefs, values, and spiritual practices into the care plan, with occasional oversight.
 - Shows initiative in addressing non-biomedical aspects but may need occasional guidance to be thorough.
- The Student Doctor uses a whole person approach without prompting.
 - Proactively inquires about and addresses mental health, emotional well-being, and social circumstances in every patient interaction.
 - Consistently considers and integrates the patient's beliefs, values, and spiritual practices into the care plan.
 - Demonstrates a comprehensive understanding of the importance of a holistic approach and applies it seamlessly in all aspects of patient care.

13. Demonstrates a High Level of Professionalism Expected of a Medical Student:

- Below Expectations: Displays unprofessional behavior, such as tardiness, unpreparedness, or lack of integrity.
- Meets Expectations: Adheres to professional standards, maintains ethical conduct, and shows reliability in duties.
- Exceeds Expectations: Demonstrates exemplary professionalism in all aspects of practice, including accountability, empathy, and cultural sensitivity.
- Exemplary: Sets a benchmark for professionalism, exhibits leadership qualities, and earns trust and respect from peers and mentors.

14. Demonstrates Appropriate Medical Knowledge in Their Current Year of Education:

- Below Expectations: Shows gaps in fundamental knowledge relevant to the current year of education.
- Meets Expectations: Exhibits sound understanding and application of core medical concepts.
- Exceeds Expectations: Integrates knowledge across disciplines and applies principles creatively.
- Exemplary: Possesses in-depth knowledge, stays updated with advances, and contributes to medical education.

15. Demonstrates Excellent Interpersonal and Communication Skills:

- Below Expectations: Struggles with effective communication, shows poor listening skills, or lacks empathy.
- Meets Expectations: Communicates clearly, listens actively, and demonstrates empathy in patient interactions and team communication.
- Exceeds Expectations: Exhibits advanced communication skills, resolves conflicts constructively, and fosters therapeutic relationships.
- Exemplary: Displays exceptional empathy, communicates with clarity and compassion, and adapts communication style effectively to diverse situations.

16. Demonstrates Self-Directed Learning:

- Below Expectations: Shows minimal initiative in learning, relies heavily on others for guidance, and lacks curiosity.
- Meets Expectations: Engages in self-directed learning activities, seeks out learning opportunities, and demonstrates curiosity and motivation.
- Exceeds Expectations: Takes proactive steps to expand knowledge, seeks feedback for improvement, and demonstrates continuous learning.
- Exemplary: Shows exceptional self-motivation, pursues advanced learning experiences, and contributes to the learning environment through sharing knowledge and mentoring others.

17. Contributes to a Patient Culture of Quality and Safety:

- Below Expectations: Shows disregard for safety protocols or quality improvement initiatives.
- Meets Expectations: Participates in quality improvement efforts and adheres to safety guidelines.
- Exceeds Expectations: Identifies opportunities for improvement and actively promotes a culture of safety.
- Exemplary: Leads quality improvement projects, fosters teamwork, and advocates for patient-centered care.

18. Based on the Student Doctor's Performance During this Clerkship, the Student Doctor is:

- Below Expectations for an Incoming OMS III:
 - Frequently misses or misunderstands key clinical information and struggles to apply basic medical knowledge.
 - Demonstrates poor clinical skills, such as ineffective patient interviewing, examination techniques, or documentation.
 - Exhibits unprofessional behavior, such as poor communication, lack of punctuality, or inappropriate interactions with patients or staff.
 - Requires constant supervision and correction, showing little to no improvement over time.
- Meets Expectations for an Incoming OMS III:
 - Understands and applies basic medical knowledge appropriately in most clinical situations.
 - Demonstrates acceptable clinical skills, including patient interviewing, examination techniques, and documentation, with occasional errors.
 - Exhibits professional behavior, including effective communication, punctuality, and appropriate interactions with patients and staff.
 - Requires routine supervision but shows a willingness to learn and improve.
- Advancing but Not Yet Performing at the Level of an Incoming OMS IV:
 - Applies medical knowledge more confidently and accurately, though may still have occasional gaps.
 - Demonstrates improving clinical skills, with more consistent performance in patient interviewing, examination techniques, and documentation.
 - Consistently exhibits professional behavior and is becoming more independent in clinical tasks.
 - Requires periodic supervision and feedback, showing clear signs of development and readiness for greater responsibility.
- Consistently Meeting OMS IV Performance Targets:
 - Confidently and accurately applies medical knowledge in a variety of clinical situations.
 - Demonstrates strong clinical skills, including effective patient interviewing, examination techniques, and documentation, with minimal errors.
 - Consistently exhibits professional behavior, effective communication, and appropriate interactions with patients and staff.
 - Functions with minimal supervision, showing readiness for more independent clinical responsibilities.
- Meeting Graduation Target:
 - Exhibits thorough and accurate application of medical knowledge across a wide range of clinical situations.
 - Demonstrates advanced clinical skills, including proficient patient interviewing, examination techniques, and documentation.
 - Consistently exhibits high levels of professionalism, effective communication, and appropriate interactions with patients and staff.

- Functions independently with minimal supervision, showing readiness for residency-level responsibilities.
- Exceeding Performance Targets and Demonstrating Aspirational Goals:
 - Applies medical knowledge with exceptional depth and accuracy, often contributing new insights or approaches.
 - Demonstrates exemplary clinical skills, including highly effective patient interviewing, examination techniques, and documentation.
 - Consistently exhibits outstanding professionalism, communication, and interactions with patients and staff, serving as a role model for peers.
 - Functions independently with exceptional competence, often taking on leadership roles and showing readiness for advanced responsibilities in residency.

Tips for Providing Qualitative Feedback

1. Be Specific and Concrete

- **Provide Clear Examples:** Use specific instances to illustrate your points. Instead of saying "You need to communicate better," say "During the patient interview on June 1st, you struggled with maintaining eye contact and seemed unsure of how to ask follow-up questions. Practicing these skills could improve your patient interactions."
- **Focus on Behaviors:** Highlight specific behaviors rather than general traits. For example, "You demonstrated excellent clinical reasoning when you identified the differential diagnoses for the patient with chest pain."

2. Be Balanced

- **Include Positives and Areas for Improvement:** Ensure feedback includes both what the student is doing well and what they can improve. This balanced approach can make the student more receptive to constructive criticism.
- **Use the Sandwich Method:** Start with positive feedback, then provide constructive criticism, and end with another positive comment. This method can help maintain the student's motivation and confidence.

3. Be Objective and Non-Judgmental

- **Focus on Observations:** Base your feedback on what you have directly observed rather than on assumptions or hearsay. Use objective language that describes actions and behaviors.
- **Avoid Personal Criticism:** Frame feedback in a way that addresses the behavior, not the person. For instance, say "The note you wrote for the patient lacked detail," instead of "You are a poor note-taker."

4. Be Developmental

- **Provide Actionable Suggestions:** Offer specific advice on how to improve. For example, "To improve your patient interviews, try to use open-ended questions to encourage patients to share more about their symptoms."

5. Be Empathetic and Supportive

- **Show Understanding:** Acknowledge the challenges and pressures the student may be facing. Express confidence in their ability to improve and succeed.
- **Encourage Reflection:** Prompt the student to reflect on their own performance and identify areas for self-improvement. Ask questions like "What do you think went well during your patient interaction? What could you do differently next time?"

6. Be Consistent and Fair

- **Maintain Standards:** Ensure that your feedback is consistent with the evaluation criteria and standards of the clerkship program.
- **Avoid Bias:** Be mindful of personal biases and strive to provide fair and equitable feedback to all students.

7. Foster a Positive Learning Environment

- **Create an Open Atmosphere:** Encourage students to ask questions and seek feedback actively. Make it clear that feedback is a part of the learning process and is intended to help them grow.
- **Model Feedback Reception:** Show how to receive feedback gracefully by demonstrating this behavior when you receive feedback from others.

Tips for Providing Comments for the MSPE

1. Be Descriptive and Specific

- **Provide Concrete Examples:** Include specific instances that highlight the student's skills, behaviors, and accomplishments. Instead of general statements, use detailed anecdotes that illustrate key points.
- **Highlight Key Competencies:** Address specific competencies such as clinical skills, medical knowledge, communication, professionalism, and teamwork.

2. Maintain a Balanced Perspective

- **Include Strengths and Areas for Improvement:** Offer a fair and balanced view by mentioning both the student's strengths and areas where they can improve.
- **Use the STAR Method:** Describe situations (S), tasks (T), actions (A), and results (R) to provide a comprehensive picture of the student's performance.

3. Be Objective and Fair

- **Avoid Subjectivity:** Base comments on observable behaviors and facts rather than opinions. Use objective language to describe the student's performance.
- **Ensure Consistency:** Align comments with the grading and evaluation criteria used throughout the medical school. Avoid any bias or favoritism.

4. Be Professional and Respectful

- **Use Professional Language:** **Maintain** a formal tone and avoid colloquial language. Respect the student's dignity and focus on constructive feedback.
- **Be Mindful of Language:** Avoid terms that might be misinterpreted or seem overly critical. Be tactful and supportive.

5. Focus on Development and Growth

- **Highlight Progress:** Mention how the student has grown and developed over time. Note any improvements in areas where the student initially struggled.
- **Provide Context for Achievements:** Explain the significance of the student's accomplishments within the context of their medical education and future career.

6. Be Comprehensive

- **Cover All Relevant Areas:** Ensure that comments address all critical aspects of the student's performance, including clinical rotations, academic achievements, research, leadership, and extracurricular activities.
- **Integrate Feedback from Multiple Sources:** Incorporate feedback from various preceptors, peers, and self-evaluations to provide a well-rounded assessment.

7. Ensure Clarity and Coherence

- **Be Clear and Concise:** Write comments that are easy to read and understand. Avoid unnecessary jargon and ensure that each comment clearly conveys its intended message.
- **Maintain Logical Flow:** Organize comments in a logical order, following the structure of the MSPE. Ensure a smooth transition between different sections.

8. Highlight Unique Attributes

- **Emphasize Distinctive Qualities:** Mention any unique qualities, skills, or experiences that set the student apart from their peers. This could include exceptional research, leadership roles, or community service.

- **Acknowledge Awards and Honors:** Note any awards, honors, or special recognitions the student has received during their rotation.

9. **Be Honest and Transparent**

- **Provide Honest Feedback:** Offer an honest and accurate assessment of the student's performance, avoiding overly positive or negative extremes.
- **Include Context for Challenges:** If the student faced challenges or setbacks, provide context, and describe how they addressed and overcame these issues.

10. **Review and Revise**

- **Seek Input from Colleagues:** Have other faculty members review the comments to ensure accuracy and fairness.

Tips for Preceptor-Student Interaction

Training talking points for providing constructive criticism, learning opportunities, conducting orientations and exit interviews, offering inclusive excellence learning opportunities, developing SMART goals, considering cultural factors in patient treatment, and treating students with respect for medical students:

- **Constructive Criticism:**
 - Focus on specific behaviors or actions rather than personal traits.
 - Use a feedback sandwich approach: start with positive feedback, address areas for improvement, and end with encouragement.
 - Provide actionable suggestions for improvement and offer support for skill development.
- **Learning Opportunities:**
 - Encourage active participation in clinical cases, discussions, and hands-on experiences.
 - Offer access to resources such as workshops, seminars, and online learning modules.
 - Facilitate mentorship and peer learning opportunities to enhance knowledge and skills.
- **Orientations and Exit Interviews:**
 - Conduct comprehensive orientations to familiarize students with expectations, resources, and support systems.
 - Use exit interviews to gather feedback, assess experiences, and identify areas for program improvement.
 - Provide guidance on career planning, goal setting, and professional development during exit interviews.
- **SMART Goals Development:**
 - Collaborate with students to develop Specific, Measurable, Achievable, Relevant, and Time-bound (SMART) goals for clinical rotations.
 - Encourage goal alignment with learning objectives, professional growth, and patient care improvement.
 - Provide feedback and guidance to help students track progress and adjust goals as needed.
- **Consideration of Cultural Factors in Patient Treatment:**
 - Emphasize the importance of cultural competence in delivering patient-centered care.
 - Provide training on recognizing cultural nuances, addressing language barriers, and respecting patients' beliefs and values.
 - Encourage students to seek cultural consultations or resources when encountering unfamiliar cultural contexts.
- **Treating Students with Respect:**
 - Foster a culture of mutual respect, open communication, and collaboration.
 - Acknowledge students' contributions, efforts, and achievements.
 - Provide a supportive and inclusive learning environment free from discrimination or harassment.

- By incorporating these training talking points, educators can effectively support medical students in their professional development, create meaningful learning experiences, promote diversity and inclusion, and cultivate a culture of respect and excellence in medical education.