

STANDARD OPERATING PROCEDURE – Adding Preceptors to Rotations

1. INTRODUCTION

1.1 PURPOSE

This standard operating procedure (SOP) describes the process for assigning preceptors to clinical learners when scheduling clinical learners into rotations. If you know which preceptor a learner is working with on a particular rotation, you should add this information into the one45 system. This not only simplifies the evaluation sendout process, it increases the level of granularity of data collected with respect to clinical learning placements. When preceptors are attached to learners on clinical rotation schedules this information is of significant utility for gathering data related to preceptor funding.

1.2. SCOPE

If a preceptor working with an individual clinical learning is known for a particular rotation this information should be entered into the schedule. Each program has the ability to add preceptors to clinical learners in the rotation schedule, but this should conform to the protocol described in section 1.5. If new rotation names need to be generated see SOP – “One45 ROTATION NAMING”.

1.3. TRAINING AND INFORMATION

Please review one45’s help article titled “**How do I match learners with their preceptors on the rotation schedule?**” available within one45’s online support portal for procedural information on creating, editing, and/or deleting rotations. Schulich School of Medicine & Dentistry also offers arms-length support for troubleshooting issues with one45. Please contact helpdesk@schulich.uwo.ca for troubleshooting assistance.

1.4. DEFINITIONS

PGME – Postgraduate Medical Education

Preceptor – physician assigned to a clinical learner who gives practical experience and training to the learner during their scheduled rotation

Service – medical or surgical services and the supporting laboratories, equipment and personnel that comprise the medical or surgical mission(s) of a hospital (e.g., Vascular Surgery, Cardiology, Gastroenterology)

Site – the location of the rotation service (commonly hospital name, but also community)

UME – Undergraduate Medical Education

1.5. GUIDELINES

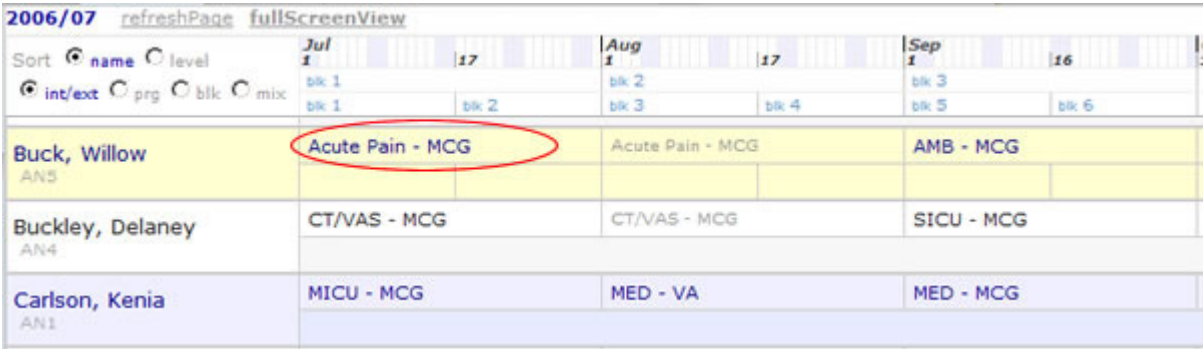
- Rotation names should be descriptive, acting as a reference that enables program administrators anywhere in the Schulich or London hospital system to understand to which rotation the name is referring
- Common rotations names should be universally applied across all programs – these should be applicable to any department and/or program.
- Unique, program-specific rotation names should be specific enough that they can be understood Schulich-wide.
- Common abbreviations (e.g., ACE, CTU) are fine, as these are common medical school nomenclature.

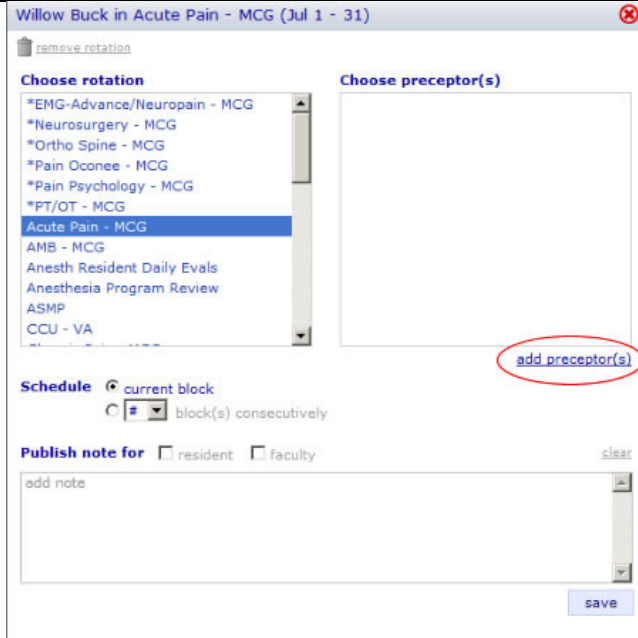
- Sites should be captured when possible using abbreviations (e.g., VH, UH, SJHC, WRH, HDGH). This reduces the length of the total rotation name, de-cluttering one45 schedules and drop-down lists as well as any future rotation report files.
- ALL rotation names must identify site(s) where rotation occurs.

2. PROCEDURE

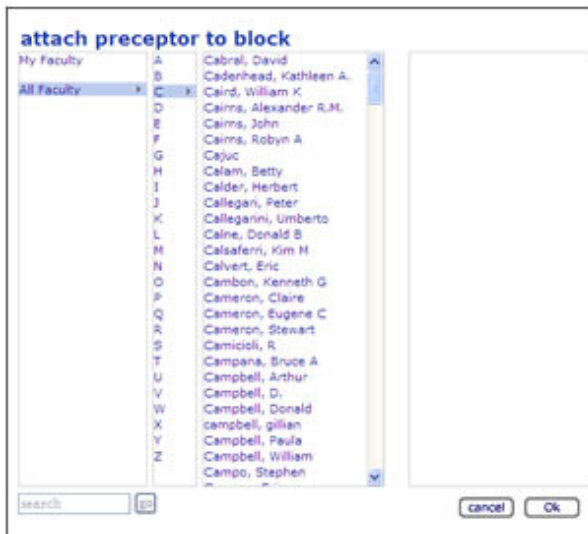
It is your responsibility to understand this procedure before performing the following task. If you do not understand the processes described in this section of this document please refer to one45's internal support documents (through their Support Portal). If it is still not clear then contact Schulich one45 support.

2.1. MATCH A LEARNER WITH A PRECEPTOR

Step	Action																
1.	<p>Click the Schedules tab. Click on Rotation Schedule. After a few moments, your schedule appears.</p>  <p>The screenshot shows a web interface for the 2006/07 rotation schedule. At the top, there are links for 'refreshPage' and 'fullScreenView'. Below that, there are sort options: 'name' (selected), 'level', 'int/ext', 'prg', 'blk', and 'mix'. The main table has columns for 'Jul 1-17', 'Aug 1-17', and 'Sep 1-16'. The rows list learners and their rotations. The rotation 'Acute Pain - MCG' for learner 'Buck, Willow' is circled in red.</p> <table border="1"> <thead> <tr> <th></th> <th>Jul 1-17</th> <th>Aug 1-17</th> <th>Sep 1-16</th> </tr> </thead> <tbody> <tr> <td>Buck, Willow ANS</td> <td>Acute Pain - MCG</td> <td>Acute Pain - MCG</td> <td>AMB - MCG</td> </tr> <tr> <td>Buckley, Delaney AN4</td> <td>CT/VAS - MCG</td> <td>CT/VAS - MCG</td> <td>SICU - MCG</td> </tr> <tr> <td>Carlson, Kenia AN1</td> <td>MICU - MCG</td> <td>MED - VA</td> <td>MED - MCG</td> </tr> </tbody> </table>		Jul 1-17	Aug 1-17	Sep 1-16	Buck, Willow ANS	Acute Pain - MCG	Acute Pain - MCG	AMB - MCG	Buckley, Delaney AN4	CT/VAS - MCG	CT/VAS - MCG	SICU - MCG	Carlson, Kenia AN1	MICU - MCG	MED - VA	MED - MCG
	Jul 1-17	Aug 1-17	Sep 1-16														
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Carlson, Kenia AN1	MICU - MCG	MED - VA	MED - MCG														
2.	Find the learner on the list on the left-hand side. To the right of the learner's name, click the rotation the learner is taking with the preceptor. The Rotation Picker appears.																
3.	In the Rotation Picker, click the add preceptor(s) link. The attach preceptor block window appears																



In the new window, click the **first letter of the preceptor's last name**. A list of all faculty members whose last names begin with that letter appears.



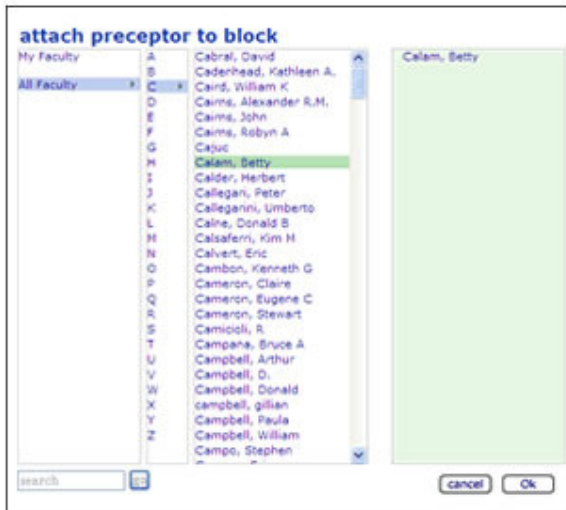
4.

If you know the preceptor is in your Faculty Rolodex, you can narrow this search by clicking **My Faculty** instead. A list of your faculty will appear.

You can also find a preceptor by typing the first few letters of their last name into the search box and clicking the Go button. A list of matching faculty will appear.

In the list of faculty, click the **preceptor**. Their name appears on the right-hand side.

5.



You can match a learner with more than one preceptor in a given rotation. To do this, repeat steps 3 and 4 until all the preceptors are listed on the right-hand side.

To remove a preceptor that you have selected by mistake, simply click on their name.

Click the **Ok** button. The preceptor is now matched with the learner for that particular rotation. One45 can use this information when it is time to send out evaluation forms for that block.

6.

2006/07 refreshPage fullScreenView

	Jul 1	17	Aug 1	17	Sep 1	16
Sort <input checked="" type="radio"/> name <input type="radio"/> level	blk 1		blk 2		blk 3	
<input checked="" type="radio"/> int/ext <input type="radio"/> prg <input type="radio"/> blk <input type="radio"/> mix	blk 1	blk 2	blk 3	blk 4	blk 5	blk 6
Buck, Willow AN5	Acute Pain - MCG (J Lane)		Acute Pain - MCG		AMB - MCG	
Buckley, Delaney AN4	CT/VAS - MCG		CT/VAS - MCG		SICU - MCG	
Carlson, Kenia AN1	MICU - MCG		MED - VA		MED - MCG	