



Tips for Teaching in a Busy Family Practice in the Time of COVID

Case:

Sarah is a community-based family physician who runs a busy family practice that has had to make many changes during the COVID pandemic, including introducing virtual visits. The number of office visits in the clinic are down significantly. Sarah enjoys teaching and has been asked to take medical students into her practice after May 25, 2020 when the clerks are returning to clinical learning environments. At the best of times, when there is a learner in her practice, it is a challenge to keep up and to finish at a reasonable time. Sarah is interested in learning how to organize herself and her practice so she can offer a great learning experience for her clerk during the pandemic.

Objectives for you as a preceptor:

1. Assign meaningful projects to your clerk during any down time in clinic
2. Find 'value added' benefits to your practice when you teach clerks
3. Organize yourself and your practice to include clinical clerks in virtual visits

Family Practice is normally very busy but in the midst of an unprecedented pandemic, it has changed substantially. You are likely spending a lot more time on the phone, on your EMR or now on video visits using platforms like Pexip.

Before a learner arrives in your practice, now is a good time to think about what you could be doing to make this a valuable learning experience, how to be enthusiastic about the opportunities and challenges created by the pandemic and how your practice is adapting to the new normal.

Before you take students at this time, have a huddle with your staff to make sure they are on board and decide on what the student will be doing. Consider the safety protocols you have in place for your staff, yourself, your learner and your patients. Also, discuss how you will schedule patients to accommodate the extra responsibilities and types of appointments needed during COVID.

A good orientation is essential and can be delegated to your staff, if appropriate. Give the student dedicated workspace that has the tools they need for visits, ensures physical distancing and is appropriately disinfected. Engage the student in a daily (or more frequent) schedule for this. The following list includes suggestions for important tasks you can delegate to a learner that help with patient care, are valuable for the clerk's and your learning and ultimately reduce your workload!

Teaching Clinical Clerks - Ideas for Meaningful Work

- Ask learner to review EMR charts and address any deficiencies – fill in areas needed.
- Have the learner review incoming labs; they can use labtestsonline.org as a resource.
- Ask learner to do online search around a complex patient seen or specific patients/diseases you want to learn more about.
- Have learner complete clinical notes on shared visits that include you both. You can go on to do another virtual visit while the clerk types up the last visit in the EMR and then you can review it once you are ready.
- Limit teaching until you have the time – over lunch for instance.
- Be clear about expectations around time so the clerk knows their schedule and when to touch base with you.
- Find out what the clerk wants to learn more about and select specific patients in your practice best suited to meet the learner's needs. The clerk can initiate a virtual visit to meet with the patient.
- Share your learner with a colleague so you get a break from time to time.
- Send the clerk to work with a community pharmacist for a day.
- Have the clerk work with another team member for a day.
- Have the learner tackle a project – get the learner to teach you!
- Have learner spend time with receptionist – this can be very eye opening.
- Open the financial records of your practice to your clinical clerk so they can see the business side of practice.
- Get clerk to fill out forms or create first draft of any letters.
- Have the clerk do a chart review in the EMR and create a progress note that defines some of the issues to be addressed in follow up.
- Your clerk could identify a great journal article and present this to you and your colleagues – practicing appropriate physical distancing of course!
- Your clinical clerk can do detailed family histories or create a genogram when needed for specific families and enter these into the EMR.
- Creating detailed referral notes using the QuRE guidelines for SK is another great means of engaging your clerk and saving you time.
- Under your supervision, clerks can write prescriptions; before they are sent to the pharmacist by you.

- Plan a “Lunch and Learn” and have the clerk do a presentation.
- Have your learner do an EMR Chart Audit – this could be looking at how well you are following specific CPG or Choosing Wisely recommendations.
- Get a literature review on a topic that you need to know about since the pandemic - could be related to practice management such as same day appointments and how this can reduce use of your waiting areas or it could be on COVID related questions – such as dermatology findings in children.
- Patient Education materials that are specific to your practice or finding the best ones online that you want to use in your practice – can all be done by your clerk. Pick the topic and let them do the search and the critical appraisal including the literacy assessment.
- Develop a list of community resources that would be of value to your patients given the new stresses – topics might include new financial assistance available, mental health resources, etc.
- A clinical clerk could do some prep work by calling each one of your booked patients BEFORE you speak to the patient and get a lot of the history recorded. They can ask about home BP measurements, weights, etc. This can all be done in advance so you have less to do when you call the patient.
- If you have in clinic visits, have the clerk involved in each of these.
- Medication reviews, on complex senior patients for instance, can be done by the clerk who can also touch base with community pharmacist and reconcile your EMR list with the pharmacist’s records and can also follow up with patients to make sure the meds are all correct. They can do post hospital d/c reconciliations. Clerks can update EMRs for allergies as well.
- Have clerks find cheaper meds that might help patients who are struggling with drug costs. They can help identify drug substitutions if there are shortages.
- Clerks can use Rx Files resources and post these on your computer desktops or place paper copies in the practice where they would be handy.
- Have a clinical clerk complete the Patients Medical Home (PMH) questionnaire (which you can be paid for!). Check out the website through the SCFP.
- Get learners to identify all your patients over the age of 65 who have not had their Pneumovax. Get them to arrange recalls for these. Get them to investigate the new protocols for both Prevnar and Pneumovax.
- Clerks can create resources you need on your desktop for easy access in the future or information for your staff or patients.
- Have the clerk engage in a Pandemic plan for your office.
- Finding “best practice” resources on Virtual Visits can be another project that would be valuable.

- Do immunization recalls for children who may be missing their current immunizations.
- Do pap recalls but do a periodic health exam (PHE) history on the phone first. Review all screening and have the learner arrange follow up prn.
- Have your clerk use the Rourke Well Baby Visit Records on the phone before any in clinic visit and enter these notes.
- Review your Advance Care Directives approach and get more of these out to patients. These can be found at the SHA website.
- Clinical clerks can do smoking cessation counselling in virtual visits.
- Reverse the learning: have your clerk review virtual visit best practices and then give you feedback on what you are doing that might help you improve as they observe you. You can then do the same for them.
- Have your clinical clerk do cold calls to those patients who are vulnerable or at risk and screen to see if they need a virtual visit.
- Involve your learners in all your meetings including evening WebEx meetings through CME or the SHA. They can take notes and find areas where you might have to change your practice and then do a project to make sure these changes are implemented in your practice. They can be a great support for helping you make the changes now required.
- Use your learners' expertise! Maybe they know IT platforms to help you engage in new ways of offering care. They may have past lives with amazing areas of expertise that they are willing to share. Ask and get to know their backgrounds.
- Have your clerk do a wellness "intervention" for you and your staff. Learn some of the mindfulness techniques, relaxation training and other approaches that will be useful to you, to them, and to their future patients.

Have fun. Show learners how flexible and adaptable family physicians can be. Engage clerks in different ways and still have amazing learning activities that help you and your patients during these difficult times. This is an amazing opportunity; creatively addressing our current challenges.

With thanks and appreciation to all our wonderful preceptors and our patient and flexible learners!

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