



# **A Clinician's Guide to Shadowing**

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## Interprofessional Education Course Leadership



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# Educational Framework for Interprofessional Shadowing

## *The Who, What, Why, and Where*

### **Who?**

Medicine and pharmacy students during their first and second year are required to satisfy interprofessional education requirements in an effort to prepare physicians and pharmacists that are competent in the domains of interprofessional collaborative practice and can function effectively and efficiently in contemporary models of healthcare.

### **What?**

Shadowing other practitioners will allow students to gain a broader perspective of the role that different professions play in patient care. The student will observe practitioner interactions with patients and other team members to understand practices for collaboration, teamwork, as well as patient safety.

### **Why?**

Health care delivery is a multidisciplinary practice that requires precise coordination of care among different professions and provider types. However, health care providers often do not understand other disciplines' daily responsibilities, teamwork interface, and communication issues, which inhibits the effective coordination of patient care.

### **Where?**

Each student currently shadows two professions. All students are required to complete a nursing shadowing requirement. The other shadowing requirement is met by shadowing a practitioner from Occupational Therapy (OT), Physical Therapy (PT), Speech-Language Pathology (SLP), or dietetics. The second shadowing requirement is chosen based on student and clinical availability.

## **Learning Objectives & Outcomes for Experience**

### **Shadowing Session Learning Objectives**

Through shadowing, students will be able to do the following:

1. Describe the role of the professional in patient care (i.e., different types of roles, duties, conditions of patient seen, setting of practice)
2. Discuss how the professional communicates with other health professionals
3. Identify strategies used by the professional to describe their findings and recommendations to patients and family members
4. Interact respectfully with other health professionals, patients and family members in a clinical environment

### **Applications in Interprofessional Collaborative Practice (IPCP) Course Learning Outcomes**

The above session learning objectives serve as a component in preparing students to meet the overarching course learning outcomes for Applications in IPCP, which are additionally aligned with the Interprofessional Education Collaborative (IPEC) competencies.

By the end of the course, students will be able to do the following:

1. Create respectful and cooperative relationships with other health professionals
2. Explain the roles and responsibilities of the health professionals/students in the contexts you experienced and how the team works together to provide care
3. Listen actively and encourage ideas and opinions of other team members, patients and/or family members
4. Communicate clearly and respectfully with patients and family members
5. Demonstrate use of teamwork skills in working with other health professionals
6. Describe strategies for supporting healthy behavior change and/or patient safety through interprofessional collaboration
7. Identify shared professional values including equity in health care access and quality and patient autonomy

# Instructional Design and Assessment

For many students, the shadowing experiences in Applications in IPCP is their first exposure to the clinical setting. This experience is not merely designed for passive observation, but is structured to be engaging and formative in their training as a future health care practitioner. With this in mind, students are assessed on a number of levels, including before, during, and after the shadowing experience. These expectations are detailed below and are provided to the students in advance of their shadowing sessions.

## ***Before the Session***

- Students are expected to review an informational PowerPoint created, updated, and approved by our clinical partners to establish a working understanding of the fundamental roles and responsibilities of that profession.
- Additionally, students must complete an Institute for Healthcare Improvement (IHI) Open School Module entitled, *PFC 201 A Guide to Shadowing: Seeing Care through the Eyes of Patients and Families*.
- Students are assessed before the shadowing experience by an electronic quiz on the material in the PowerPoint, as well as through completing the IHI Open School Module PFC 201: A Guide to Shadowing: Seeing Care through the Eyes of Patients and Families.
- Ahead of the shadowing date, students are asked to identify their shadowing sites, estimated the travel time and preceptor name and contact information. If they are assigned to a session with another student, they are asked to connect with the other student before the shadowing date to coordinate their arrival.

## ***During the Session***

- Students are expected to establish trust with the practitioners they shadow and maintain a professional presence throughout the experience. This includes, but is not limited to, arriving punctually to the right location; having completed the pre-work, remaining engaged during the session, asking thoughtful question; communicates with the practitioner, patients, and families respectfully and with integrity. Appendix B contains a guided shadowing handout that students are provided to help them gauge what questions to ask.
- Students are assessed on professionalism via an app-based electronic passport that gauges how the student presented themselves during the session, and their understanding of the importance of interprofessional collaborative practice (IPCP). **It is the student's responsibility to provide the practitioner with access to the electronic passport at each shadowing.** The details on the app and instructions are in Appendix A.

## ***After the Session***

- Following the shadowing experience, students should reflect on the experience, how they plan on working with that profession in the future and what additional skill development is needed to do so effectively.
- Students are assessed on the overall experience by completing a critical reflection in which they recount the experience, identify the roles and responsibilities observed of the professional, and how that professional interacted with other members of the healthcare team, as well as patients and their families.

- If there were any concerns with the coordination of the shadowing experience, please notify the course directors and course coordinators as soon as possible to improve the experience of other students.

## **FAQ Sheet**

### **Q: What do I do if the students who are supposed to shadow me do not show up?**

A: If the student is a medical student, contact David Paulik (513-558-5580 or [david.paulik@uc.edu](mailto:david.paulik@uc.edu)). If the student is a pharmacy student, contact the Melanie Fulton ([Melanie.Fulton@uc.edu](mailto:Melanie.Fulton@uc.edu)) 513-558-0705.

### **Q: Are there specific things that I should show and/or share with the students?**

A: Yes! Please include the student while you or a colleague is seeing a patient. This is a key learning experience for the students to learn about your practice.

### **Q: How do I verify that the student shadowed me?**

A: After the visit, the student will provide you with an app-based evaluation on the student's personal phone. This is a brief assessment that the student indeed attended and allows you the opportunity to provide feedback. The app-based evaluation is described in detail in Appendix B. Data provided is not immediately released to the student.

### **Q: What do I do if the students did not behave well during shadowing?**

A: Unprofessional behavior is not tolerated. Evaluations completed by the preceptor via the app are reviewed on a weekly basis for concerns by the course coordinator. If your student shows an egregious lapse in professionalism, please do not wait for the evaluation to be reviewed. Instead, contact David Paulik for medical students (513-558-5580 or [david.paulik@uc.edu](mailto:david.paulik@uc.edu)) or Melanie Fulton for pharmacy students ([Melanie.Fulton@uc.edu](mailto:Melanie.Fulton@uc.edu)) or 513-558-0705).

### **Q: What do I do if I want to give kudos to a student?**

A: If your students does something well or shows exceptional initiative during the visit, we welcome that feedback! Both colleges have mechanisms in place to acknowledge exemplary feedback provided by faculty, staff, and clinical practitioners through the app-based evaluation or by contacting David Paulik for medical students (513-558-5580 or [david.paulik@uc.edu](mailto:david.paulik@uc.edu)) or Melanie Fulton for pharmacy students ([Melanie.Fulton@uc.edu](mailto:Melanie.Fulton@uc.edu) or 513-558-0705).

### **Q: Do they students have work to do before shadowing?**

A: Yes! Details in this guide provide the instructional design of the shadowing experiences. Students should be actively engaged and thus, prepared, during the session. Inattentive, unprepared students should be noted on the evaluation so that the course directors and coordinators can address the issue in a timely manner.

### **Q: How do I know when students are coming to shadow?**

A: Each clinical site is provided a Google Spreadsheet of the dates and times that students are scheduled. In addition, the course coordinators will send weekly emails of students slated for shadowing each week.

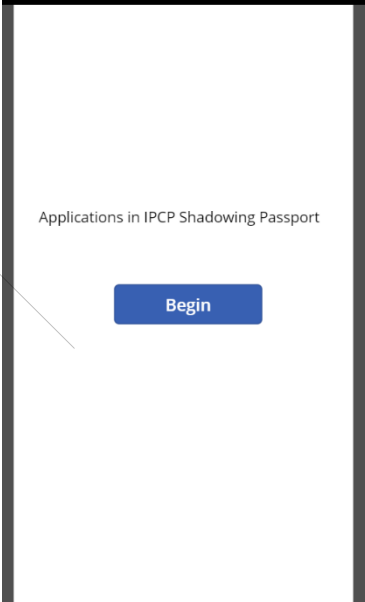
**Q: What do I do if I need to cancel shadowing?**

A: If you need to cancel a shadowing experience, please contact David Paulik (513-558-5580 or [david.paulik@uc.edu](mailto:david.paulik@uc.edu)) or the College of Pharmacy at 513-558-0705 as soon as possible so that the student can be notified and rescheduled in a timely fashion.



## Appendix A: App-Based Evaluations

**Step 1:** The student begins the evaluation process by clicking the begin button on their phone screen as shown on the right.

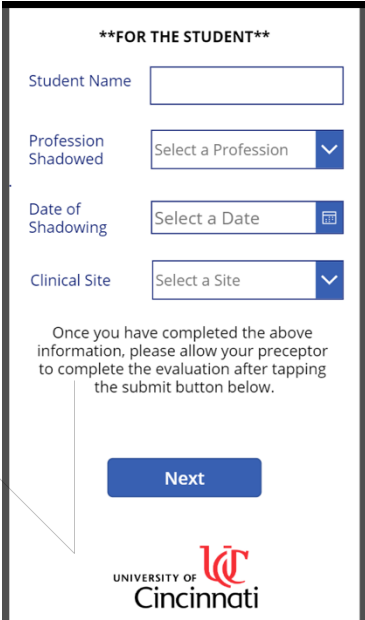


Applications in IPCP Shadowing Passport

Begin

This screenshot shows a mobile application screen with a white background and a dark border. At the top, the text "Applications in IPCP Shadowing Passport" is centered. Below this text is a blue rectangular button with the word "Begin" in white, centered on the button. A thin grey line points from the text in Step 1 to the "Begin" button.

**Step 2:** The student will then enter their name, choose the profession they are shadowing, the date, and the site. Then tap Next.



**\*\*FOR THE STUDENT\*\***

Student Name

Profession Shadowed

Date of Shadowing

Clinical Site

Once you have completed the above information, please allow your preceptor to complete the evaluation after tapping the submit button below.

Next

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This screenshot shows a mobile application screen with a white background and a dark border. At the top, the text "\*\*FOR THE STUDENT\*\*" is centered. Below this are four form fields: "Student Name" with a text input box, "Profession Shadowed" with a dropdown menu showing "Select a Profession", "Date of Shadowing" with a date picker showing "Select a Date", and "Clinical Site" with a dropdown menu showing "Select a Site". Below the form fields is a paragraph of text: "Once you have completed the above information, please allow your preceptor to complete the evaluation after tapping the submit button below." Below this text is a blue rectangular button with the word "Next" in white, centered on the button. At the bottom of the screen is the University of Cincinnati logo, which consists of the letters "UC" in a stylized red font above the text "UNIVERSITY OF Cincinnati". A thin grey line points from the text in Step 2 to the "Next" button.

**Step 3:** Once the student taps Next, the preceptor evaluation screen will then come up. At this time, please answer the brief questions. When you are done, tap Next.

**\*\*Preceptor Evaluation\*\***

It is important for health professions students to understand that health care is a team sport. They have been scheduled to rotate with integral members of healthcare teams, including nurses, physical therapists, occupational therapists, speech-language pathologists, and dietiticians. We know you are very busy, so we appreciate the time you are spending to help our students see the critical role that you play in care delivery!

**Please check whether your student met the basic expectations during this shadowing experience.**

Punctual

Professional Interaction with team members

Communicated role to patient

Demonstrated good listening skills

After completing the above, please hit next to enter qualitative feedback. Please note, if you entered "No" for any of the above, please elaborate on the next screen.

**Next**

**Step 4:** This screen gives you the opportunity to provide qualitative feedback. Please consider providing thoughtful feedback that is actionable to help the student further their training. Please note: if you responded no to any of the prompts on the previous screen (see Step 3), you must provide an explanation here. When you are done, tap Submit.

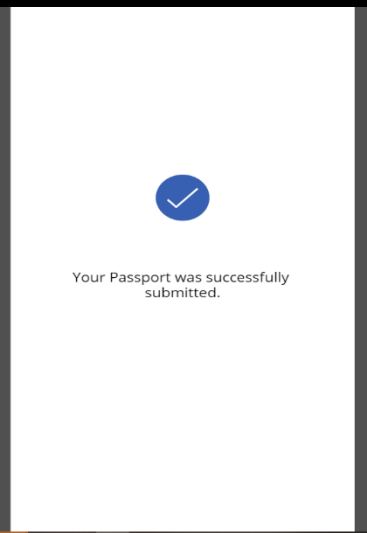
**\*\*Preceptor Evaluation\*\***

At this early stage in our students professional development, they benefit the most from qualitative, specific feedback from clinicians. Please include thoughts of strengths and areas for improvement. If you marked no on any of the previous screen, this feedback must be provided.

Comment

**Submit**

**Step 5:** The evaluation is now complete! You may return the device to the student.





## Appendix B: Guided Shadowing

### Guided Shadowing Overview

**You will be shadowing two of the following professions:**

Nursing

Dietetics

Physical Therapy (PT)

Occupational Therapy (OT)

Speech-Language Pathology (SLP)

**Intended learning outcomes for the shadowing experience:**

- Describe the role of the professional in patient care (i.e. different types of roles, duties, conditions of patient seen, setting of practice)
- Discuss how the professional communicates with other health professionals
- Identify strategies used by the professional to describe their findings and recommendations to patients and family members
- Interact respectfully with other health professionals, patients and family members in a clinical environment

**Consider the following when observing the practitioner interacting with patients, families, or other practitioners:**

- What is similar or different about this profession compared to your prior assumptions?
- What type of communication, e.g., verbal, written, or non-verbal does the healthcare professional use with the patient and/or family?
- How do you think this way of communicating with patients/families compares with the types of communication you will use as a healthcare professional?
- Was there anything about your shadowing experience that surprised you?

**Discuss the following with the practitioner before the shadowing experience ends:**

- Does this reflect a typical day?
- What types of communication does the healthcare professional normally have with patients and what information do they normally give? At what points during the patient's care do they communicate with patients?
- How does the healthcare professional manage situations where patients are angry or upset? What strategies can be adopted to help professionals cope with challenging situations?
- Does the team discuss and agree on the information that is shared with patients/families and who will give this information?
- With what other professions would the healthcare professional normally communicate and how?
- Would the healthcare professional normally communicate with a member of your healthcare profession and if so, in what situation?