PROFESSIONAL DEVELOPMENT: PRACTICAL EXPERIENCE IN GERIATRIC CARE MANAGEMENT
GEY 6936

COURSE SYLLABUS

Laura J. Perry, Ph.D.
Email: Preceptors please use ljp@ufl.edu
Students please use the Canvas email system

Every day you make progress. Every step may be fruitful. Yet there will stretch out before you
an ever-lengthening, ever-ascending, ever-improving path. You know you will never get to the
end of the journey. But this, so far from discouraging, only adds to the joy and glory of the
climb.

- Sir Winston Churchill (1874 – 1965)

COURSE DESCRIPTION

Through this professional development course, students have the opportunity to practice
skills and apply knowledge acquired in the other “classroom” courses in this program.

During this practical experience, the student spends a minimum of 50 hours on-site,
observing and participating in geriatric care management. While on site, the student’s work
may range from simple observation (minimum acceptable level) to active engagement
(preferred level) in the following required activities:

- conducting formal and informal client and family interviews;
- performing appropriate assessments, formal and informal;
- formulating and managing care plans; and
- making needs-based, direct referrals and brokering services between clients and
  formal and/or informal service providers.

In addition to these required areas, students may also engage in problem-solving and
advocacy for older adults and their concerns. Students may also be exposed to business or
institutional aspects of geriatric care management, which are also valuable components of
the experience. Throughout the course there is a strong emphasis on the development of
professional communication skills, both in correspondence and report preparation. Through
these ancillary undertakings, the student further develops and enhances his or her overall
professional identity as a geriatric care manager.

GOALS FOR THE PRACTICAL EXPERIENCE

During the practical experience, it is anticipated that the student will expand his or her
professional identity as a geriatric care manager through

- Participation in major aspects of geriatric care management service delivery in an
  agency, facility, or business setting.
- Application of knowledge, skills, and abilities gained through GCM coursework and other
  related experiences.
- Development of professional networks and relationships with service providers and other
  vendors in the geriatric care field.
- Enhancement of professional communication skills relevant to the world of geriatric care.
• Expansion of skills in decision making, problem solving, advocacy, and case documentation.

• Engagement in business practices and/or institutional protocol, where applicable.

**PRIMARY COURSE OBJECTIVES**

In order to meet the goals of the Professional Development course,

A. Students will document a **minimum** of 50 hours at their selected site. Students typically spend more hours than this on site in order to attain the practical objectives of the course. Much of this has to do with timing and the activities available on site in any given time period.

B. While on site, students must accrue and document a minimum of 10 hours of direct client services** in each of four required major activity areas:

1. Client Interviewing;
2. Client Assessment;
3. Care Plan Development, Monitoring, Evaluation, and Modification; and

A fifth, non-required area, Other Activities, is also included for recording the manifold other activities related to geriatric care management that do not fall within the defined required areas.

Please refer to the section header **Definitions of Activities** for task descriptions of the work expected.

** Direct client services:** Activities focused on specific, identifiable client(s) or families for whom these activities are undertaken. Simply visiting with clients or engaging in general business activities such as training, research, marketing, or networking are defined under the fifth area, **Other Activities.**

**SECONDARY COURSE OBJECTIVES**

In addition to meeting the above required objectives during the class, the student is expected to also

A. Evaluate the geriatric care services rendered at the site as observed during the practical experience and report observations in Journals or Summary;

B. Demonstrate professionalism in personal presentation, behavior, and oral/written communication skills.

C. Develop methods for self-assessment with the goal of capitalizing on strengths while improving skills or presentation.

**TEXTBOOK**

No textbook is required for this course; however it is recommended that the texts and materials from previous courses be consulted *ad libitum* during the semester.

**PROCEDURE**

A. **Site Selection and Criteria.** The student locates a site or sites in which to complete the required minimum 50 hours of practical experience. Consultation with instructor during site selection is recommended, when possible. Students are encouraged to represent themselves as student-volunteers to the site, and outline the basic requirements to the service (e.g., social work) where a placement is sought. Note that some sites have requirements for volunteers or students that will be outside the scope and nature of this course and program. Some sites may require a Memorandum of
Understanding between UF and the site. These take some time to process. Please consult with the instructor if you encounter these issues.

1. **Typical Volunteer Sites.** Private geriatric care management businesses, geriatric specialty medical groups, community-based senior facilities, rehabilitation facilities, long-term or convalescent care centers, hospice organizations, and assisted living facilities. Other sites may also work if they permit the student opportunities to meet course requirements. Consult with the instructor.

2. **Employment Sites.** A student may use a current employment site if it will provide the required range of experiences. Please alert the instructor if this is the goal.

B. **Supervision on site.** The student will recruit a professional provider at the site to act as preceptor (site supervisor) during the practical experience and who will agree to evaluate the student at the end of the term, plus verify the student’s timesheet.

Students should seek to work under the supervision of a credentialed preceptor. Though a preceptor with the CGCM credential is desirable, these are not commonly found. Professionals with LCSW, CRC, RN, CMC, CCM, or CDP are usually more available. This list is not exhaustive: other credentials may also be acceptable—consult with the instructor. The rationale for this is largely for the protection of the student. Credentialing organizations hold their members to high professional standards and codes of ethics, with consequences for violation of either. Also, credentialed professionals have typically undergone supervision during their own training. They have a clearer understanding of what a practicum entails and are better acquainted with the expected skill levels of practicum students.

C. **Documentation.** Students will complete and submit, and ensure that their preceptor completes and submits, all documentation by the deadline dates specified in the Course Calendar. Students should review all applicable materials with the preceptor to ensure that the preceptor understands the expected scope of the experience.

<table>
<thead>
<tr>
<th>Documentation Item</th>
<th>Due</th>
<th>Preferred Via</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Student information Form</td>
<td>Prior to counting hours</td>
<td>Assignment Feature</td>
</tr>
<tr>
<td>b. Preceptor Information Form</td>
<td>Prior to counting hours</td>
<td>Email from Preceptor to <a href="mailto:ljp@ufl.edu">ljp@ufl.edu</a></td>
</tr>
<tr>
<td>c. Journals</td>
<td>Throughout the term</td>
<td>Discussion Feature</td>
</tr>
<tr>
<td>d. Log of Hours (Timesheet)</td>
<td>Mid-term and end of term</td>
<td>Assignment Feature</td>
</tr>
<tr>
<td>e. Summary of Practical Experience</td>
<td>End of term</td>
<td>Discussion Feature</td>
</tr>
<tr>
<td>f. Preceptor Evaluation Form</td>
<td>End of term</td>
<td>Email from Preceptor</td>
</tr>
</tbody>
</table>

D. **Schedules of Completion.** The student is expected to accrue and document a minimum of 50 hours of engagement in specific GCM activities while on site over the course of the semester. Most students find they accrue more than 50 hours on site. This is acceptable and often desirable.

1. For a full 15-week semester (e.g., Fall and Spring), this means spending an average range of about 3-5 hours in GCM activities at the site each week. Students may also find it beneficial to their overall experience to accrue additional hours these and other GCM activities while on site. Summer semester allows 12 weeks for completion and may require more hours per week on site.

2. Alternative rates of completion are acceptable (i.e., abbreviated time on site), but the instructor must be alerted in advance. Abbreviated plans of completion (shorter than the full semester) will require more than the range of 3-5 hours on site weekly, of course.
3. Holidays and unforeseen interruptions in business or supervision during the term may also require the student to spend more than the average expected number of hours on site each week.

4. In GCM—as in most human service fields—periods of high activity can alternate with periods of low activity. This means that while the minimum 50 hours on site may be completed in as little as two weeks’ full-time commitment, that short amount of time on site may not give the student enough opportunities to fulfill all of the time requirements in all of the activity areas.

5. Incompletes and the issues they create are to be avoided. Please contact the instructor if any delaying issues arise immediately upon your awareness of them. Students risk receiving an Unsatisfactory if the instructor is not alerted in a timely manner about problems with completion.

E. Reporting. Accurate reporting of all activities and hours accrued on site is imperative. Students are requested to keep track of their activities and hours with care, as these will be closely monitored per the requirements of this course.

1. Journals. The student will prepare and submit journals, expected weekly, following the provided format. Journal content reflects the student’s experiences on site that week. Journals are to be formulated in two sections, permitting both an objective recounting of the week’s activities and a subjective assessment of the week’s experiences. Journals will be graded on a Complete/Incomplete basis. The journal will also reflect the time spent in each of the required activities, once again listed here in brief form:
   - Face-to-face interviews with clients and/or family members;
   - Client assessment (including Caregiver assessment);
   - Care Plan development, monitoring, evaluation, and modification as needed;
   - Direct work in referral to formal and informal services and resources;
   - Other Activities (if present).

Note: The student will track time on site using both the journal entries and the timesheet. The tallies should match.

Please follow the directions on the Journal formats for construction of your journal. Understand that the need to track time and activities accurately supersedes personal preference for formatting in this course.

Important: Keep copies of everything you post. Submit by attaching documents or by cutting and pasting text, etc., into the frame.

Qualitative expectations: Journals should be thorough, complete, reflective, and submitted each week. Please note: students are required to follow HIPAA protocol for maintaining the confidentiality and integrity of Protected Health Information. Please identify clearly whom you’re discussing but use initials (e.g., LP, Mrs. M., Dr. X., etc.). Do not use numbers (client 1, client 2, etc.) to ID clients—it’s not possible to keep good track of them this way.

You may identify staff and professionals by name. Please note that the discussion forums are accessible to all members of the class, Instructional Technology personnel and UF e-learning staff. Though rare, it’s possible for any included sensitive information to be seen in the discussion forums. Use discretion.
2. **Log of Hours/Timesheet.**

   It’s preferred that students use the PDF template provided to track the total hours on site. This PDF conveniently tallies the hours automatically. Students submit their timesheets mid-term (unsigned) at midterm and final (signed) at the end of the term, via the Assignment feature. Print, complete, scan, and attach.

F. **Participation.** Students will engage with one another and the instructor as they progress through their practical experiences through

   1. Weekly Journal Postings: Students share and comment on their journals posted to each week’s discussion forum; and
   2. Online Meetings when arranged. Online meetings are not scheduled, but may be arranged at the discretion of the instructor or upon students’ request. Students are welcomed to initiate online conferences. All are invited to participate in all Open Conferences.

G. **Preceptor Evaluation.** The student will ensure that the preceptor completes and submits the evaluation form at the end of the term. Students must perform at the Satisfactory or better level (three (3) or above) on each criterion rated on the evaluation. Failure to meet this level of performance on any evaluated aspect will result in an Unsatisfactory grade for the semester. A Satisfactory grade is required to proceed with program completion. Please encourage your preceptor to submit comments on the evaluation in addition to providing their numeric rating of your performance. Your preceptor may share evaluation information with you, at his or her discretion.

H. **Self-Assessment.** At the end of the semester, the student will prepare a five- to seven-page Summary of Practical Experience. The Summary should be thorough, complete, reflective, and follow the format provided. Special attention will be given to the student’s clarity of expression, spelling, accurate use of terminology (medical and otherwise), and proper grammar, as these are also vital skills in presenting oneself professionally. A preferred format is provided.

**Evaluation Criteria**

- **Satisfactory**
  - All journals complete, with Objective details (Part A) and Subjective narrative addressed. Journal content must include documentation of (1) the minimum of 50 hours on site and (2) a minimum of 10 hours spent in each of the four required activity areas defined in this manual.
  - Student-site information and preceptor information submitted by deadline;
  - Log of hours/Timesheet complete, legible, and signed by student and preceptor (or some comparable arrangement), submitted by deadline.
  - Preceptor evaluation completed and submitted, with student’s scoring three (3) or above on each dimension measured; and.
  - Summary of Practical Experience complete and submitted by deadline.

- **Unsatisfactory:**
  - Any one of the following factors, or a combination:
    - Documentation incomplete or missing;
    - Journals incomplete, missing information, or findings of discrepancies between documentation;
    - Log of hours incomplete, lacking sufficient hours on site, unsigned, missing;
• Preceptor evaluation missing or student scoring lower than three (3) on any dimension measured.
• Missing or incomplete Summary of Practical Experience’
• Reports of student misconduct, unethical behavior, or unprofessionalism on site.

**COURSE CALENDAR – FULL SEMESTER COMPLETION SCHEDULE**

*The instructor reserves the option to adjust dates in this calendar to accommodate learning needs.*

Course forms (information forms, journal templates, timesheets, etc.) may be accessed through the Syllabus page in Canvas (when course is live). Please refer to the Canvas course for the effective dates in the current term.

<table>
<thead>
<tr>
<th>First Day</th>
<th>Class Opens.</th>
</tr>
</thead>
<tbody>
<tr>
<td>August 20</td>
<td>Instructor will be available for online evening office hours Thursday, August 22, 7:00 – 8:00 p.m. Eastern Time.</td>
</tr>
<tr>
<td>Official Start Day</td>
<td></td>
</tr>
</tbody>
</table>

| First week of class | Discussion Forum: Introductions. Please introduce yourself and describe your site and what you expect to be doing there. Post websites or scan and post brochures, if possible. You are also invited to share any experiences you have found particularly interesting thus far. See Canvas course for due dates. |
| Aug 20 – Aug 25     | |

| Week of August 20 | Submit Site Information Form and Clinical Experience Preceptor Information and Agreement Form. Please scan or photograph and submit to the Canvas Assignment. If more convenient, preceptors may email or sign-and-send forms directly to instructor at ljp@ufl.edu. If you’re doing an alternate completion schedule, please notify instructor. |
| Aug 26 – Dec 02    | |

| Weeks of Aug 26 – Dec 02 | Journal submissions, weekly or as they are completed. Journals are expected to cover activities from the week preceding the due date. Journals are due the Monday after the week just completed. |
|                          | |

| Week of Week of Sep 30  | Submit unsigned mid-term time sheet via Canvas Assignment. |
|                          | |

| Week of Nov 04          | Expecting late or missing documentation? Please alert instructor before this date. |
| Last week of Class Dec 02 | All course materials are due. Last day to submit documentation, including last Journal submissions, complete Summaries of Practical Experience; Final, signed Timesheets; and Preceptor Evaluations (sent to ljp@ufl.edu unless otherwise arranged). All required signatures must be affixed. Please see Canvas course for exact deadline dates. |
| Last day of Class Dec 05 | |

| Holidays (UF Observed) | Sep 02 – Labor Day, November 11 – Veterans Day |
|                       | November 27 to December 01 – Thanksgiving Holiday |

Professional Development: Practical Experience in Geriatric Care Management | GEY6936 |
PRACTICUM EXPERIENCE - RANGE AND SCOPE OF PRACTICE

Definitions of Activities
Please use these definitions in reporting your activities in your journals.

1. **Client Interviewing**: Purposeful, formal or informal gathering of subjective, self-reported information from face-to-face interactions with clients and/or families in order to identify appropriate direction for assessments and to guide the development, monitoring, and evaluation of the care plan. Periodic re-interviewing of client and/or family members to determine continued fit of care plan objectives over time. **Important Note**: Simply visiting with the client or family, running errands, or assisting in other ways (e.g., moving furniture) falls in the Other Activities area.

Examples of Interviewing:
- Initial interviews (complimentary or billed) with prospective clients/families prior to being engaged as GCM.
- Engaging with clients/families to gather biopsychosocial/spiritual information in order to begin formulating a care plan.
- Re-visiting clients/families to review/update information or gather additional personal data.

2. **Client Assessment**: Observing, assisting with, or independently conducting face-to-face, formal or informal, focused assessments designed to gather objective information to inform the care management process.

May co-occur with **Client Interviewing**, but note that **Assessment** focuses on gathering specific objective data, with a comparison of the client and/or family situation to expected objective norms. Special attention should be paid to the individual circumstances and dynamics affecting the client and family at the time of assessment.

How to tell the difference? The student is encouraged to use professional judgment in discerning Interviewing activities from Assessment in any single session with the client/family. Assessments may evaluate any pertinent area: psychosocial, cognitive, functional, and/or medical. Assessment activities may include (not exhaustive):

a. Formal assessments conducted using standard geriatric assessment questionnaires or other forms. Examples include the MMSE, a complete MSE, Geriatric Depression Scale (GDS), MDS assessment, MOCA, GHQ, PHQ, standardized interviews, facility-developed questionnaires, or other published instruments. Caregiver assessment that informs the care management process is included in this activity area.

b. Assessments via professional observations of behavior, interpersonal interaction, activities of daily living, and instrumental activities of daily living; PT/OT/SLP evals; nursing assessments; environmental, home, and facility assessments; safety assessments; assessment of fall risk; technology assessments. Conducted with or without the aid of checklists or assessment forms.

c. Periodic reassessment of client and family situation to evaluate care management needs and care plan objectives.

Note: Review of client files in preparation for assessment is certainly part of the assessment process, but file review does not take the place of the required direct, face-to-face, in-person assessment. Ten hours of direct, face-to-face assessment...
contact (observation or participation) is required for the class. Should this present an issue, please alert the instructor.

3. **Care Plan Development, Monitoring, Evaluation, and Modification:** Observing, assisting in, or independently engaging in Care Plan activities, to include (not exhaustive)

   a. **Development:** Developing the client’s Care Plan based upon information gathered through subjective reports (interviewing) and objective evaluation (assessment) of the client, the family, available resources, and supports. Establishing Care Management goals and objectives; service providers, and services as needed. Identifying roles and responsibilities to be assigned to participants in the care plan. Developing a timeline for delivery of products or services.

   b. **Monitoring:** Continually or periodically reviewing care plan goals and objectives to make sure that goals and objectives are being met and needs are being addressed appropriately. Sitting in with clients during appointments (but not waiting in waiting rooms) can be included here, as can staffing client cases in meetings with preceptor and/or care management teams. Facility Care Plan meetings are also considered monitoring.

   c. **Evaluation:** Continually or periodically comparing care plan goals and objectives to actual outcomes or performance to determine appropriate fit with current or changing needs.

   d. **Modification:** Using current information gained through monitoring and evaluating the care plan to make needed adjustments in care planning goals, objectives, timelines, and roles/responsibilities as appropriate, as client needs change over time.

4. **Referral to Formal and Informal Services:** Observing, assisting in, or independently providing individualized and direct referral to formal and informal service and resources, matching available resources to a specific client’s needs. Activities may include: using assessment information to identify formal and informal supports for suitability in meeting client needs. Using problem-solving skills and client advocacy measures to make telephone calls or in-person community contacts on behalf of a client or family; and/or negotiating services on behalf of the client. Using databases to link client and/or family members to appropriate vendors, providers, organizations, or private sources of assistance, including any funding sources.

   Note: General activities related to (a) promotion and marketing, networking, or presentations to promote your site’s services, or (b) your own research into potential service providers are in the **Other Activities** category and are not considered direct client work; these are not countable toward this activity area.

**Other Activities:** No minimum time requirement in this general activity category. Engagement in activities ancillary to or supportive of Geriatric Care Management, which may include (not exhaustive):

   **Problem-solving:** Accurately identifying problem or issue to be addressed and applying appropriate problem-solving strategies; assessing process and procedure; fine-tuning strategies to achieve acceptable outcome; evaluating outcome.

   **Advocacy:** Advocating for services, policy, and/or opportunities that may benefit individual clients or the larger population of older adults.
Business aspects: Participating in orientation and/or training; reviewing business procedures used at the site (e.g., forms, notes, technology, software); attending staff meetings; attending or presenting trainings; participating in networking opportunities or marketing activities.

Institutional protocol: Participating in orientation and trainings; reviewing procedures (forms, notes, technology, documentation training); staffings, and related.

Supervision/Consultation: engaging in supervision, consultation, or discussion with preceptor or colleagues.

Research: Reviewing client records for reasons other than individual assessment; researching information to enhance one’s own knowledge base (database) of available services, providers, vendors, organizations, programs, or referral targets; research to enhance one’s GCM toolkit.

Other tasks and activities: This area can include other activities that a GCM may do on site, including filing, answering telephones, responding to inquiries; providing information and referral—to non-clients, or pre-clients, only. Contact with established clients may be documented under the appropriate required activity area whenever possible.

Client-related tasks included under Other Activities (not exhaustive):

- Simple visiting with clients at home or in care facilities (vs. GCM care monitoring or plan evaluation or gathering data to inform referrals)
- Simple visiting with family members (vs. GCM care monitoring or plan evaluation or gathering data to inform referrals)
- Running errands or doing shopping
- Supervising medication organization
- Assisting the client or family in setting up equipment or furniture in the client’s home
- Transporting clients to appointments
- Waiting in waiting rooms
- Traveling to client’s location
- Traveling with preceptor to client’s location, unless conducting a countable activity during that time.

This level of specificity is desirable to make sure that students do receive the opportunity to spend significant time engaging in sufficient hands-on, direct client contact GCM activities. Please ensure that your documentation in your journals clearly reflects these definitions.
**EXPECTATIONS FOR STUDENTS**

- **Communication.** An experiential course requires regular communication with your instructor (via journal discussions, email, and online meetings, if scheduled) and with your colleagues in the class, if present. Students are expected to participate actively in discussions and are invited to attend online meetings if and when scheduled.

- **Ethics.** Ethical conduct is required at all times, on site and in the completion of the requirements of this course. Reports of any inappropriate behavior on site or violations of ethical conduct will result in a grade of Unsatisfactory for the course.

- **Deadlines.** Journals, assignments, and documentation are to be submitted in a timely fashion, on or before deadline dates. Any exceptions or delays must be cleared by the instructor.

- **Delays.** The student must contact the instructor by email immediately should any interruptions or delays occur during the course. Timeliness is important and delays in completion of any journals, assignments, or documentation may impact the grade and must be discussed with the instructor, with contact initiated by the student.

- **Make-up Work.** This is a student-directed experience, and as such the student is responsible for submitting materials regularly. Should the student encounter difficulty completing some aspect of the course, the instructor should be alerted immediately to make suitable arrangements for meeting the requirements.

- **Completion.** Cessation of participation in the course, particularly without prior consultation with the instructor, will result in a grade of Unsatisfactory for the course. If it becomes necessary to withdraw from this course after the drop-add period, students must initiate the process with the Registrar and follow University procedures to complete formal withdrawal. Refunds are not guaranteed. Program admins and faculty cannot help with withdrawals.

**ACADEMIC INTEGRITY AND STUDENT CONDUCT**

Students are expected to act in accordance with the University of Florida policy on academic integrity and conduct. Please review the Student Conduct Code, the Graduate Student Handbook or this web site for more details: [http://www.dso.ufl.edu/sccr/honorcodes/conductcode.php](http://www.dso.ufl.edu/sccr/honorcodes/conductcode.php)

**INFORMATION ON STUDENT SUPPORT FOR DISTANCE LEARNING**

**STUDENT SUPPORT SERVICES**

As a student in a distance learning course or program, you have access to the same student support services that on-campus students have.

- For course content questions, please consult your instructor.
- For any technical issues with the course, please visit [http://helpdesk.ufl.edu](http://helpdesk.ufl.edu) or the Help Desk at (352) 392-4357 (392-HELP). Be prepared to give your name, Gatorlink ID, student number and the course number and section (on home page).
- For a list of additional student support services, links, and information, please visit: [http://www.distance.ufl.edu/student-services](http://www.distance.ufl.edu/student-services).

**SPECIAL ACCOMMODATIONS**

Students requesting disability related academic accommodations must first register with the Disability Resource Office, [http://www.dso.ufl.edu/drc](http://www.dso.ufl.edu/drc). The DRC will provide appropriate documentation for the student to share with the instructor—prior to need.

**COMPLAINTS**

Should you have any complaints with your experience in this course, please contact the program office or visit [http://www.distance.ufl.edu/student-complaints](http://www.distance.ufl.edu/student-complaints).
PROFESSIONAL DEVELOPMENT: PRACTICAL EXPERIENCE IN GERIATRIC CARE MANAGEMENT
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SITE INFORMATION FORM
(Completed by Student)

ABOUT YOU:

Student’s name:__________________________________________________________

Contact number(s): (day)________________________ (evening)____________________

Email:________________________________________________________________

ABOUT THE SITE:

Site Name:_______________________________________________________________

Mailing Address:________________________________________________________________

________________________________________________________________________

Main Telephone number:________________________ Fax number:____________________

ABOUT YOUR PRECEPTOR:

Name:____________________________________________________________________

Credentials, licenses, certifications:___________________________________________

Job Title:________________________________________________________________

Telephone:________________________ Fax number:______________________________

Email:____________________________________________________________________

ABOUT YOUR SCHEDULE AND ACTIVITIES:

Days:______________________________________ Hours:__________________________

Briefly describe your expected primary role and activities at this site:
Preceptor Information Form
(Completed by the Student’s Preceptor)

Student’s Name: ____________________________

Preceptor Information

Name: ____________________________

Agency/Business Name: ____________________________

Position: ____________________________

Licenses, Certifications: ____________________________

Telephone: ____________________________ E-Mail ____________________________

Preceptors are requested to facilitate the student’s participation in work activities typically encountered in geriatric care management. The student is required to accrue a minimum of 50 hours on site, engaged in specific geriatric care management activities. Moreover, the student is required to participate in a minimum of 10 hours in each of the following areas:

1. Conducting in-depth, face-to-face interviews with clients and also with family members when appropriate;
2. Performing initial and ongoing assessments of the client and the environments in which care management will take place, with special attention to the individual circumstances and dynamics affecting the client and family;
3. Developing, monitoring, evaluating, and modifying detailed care plans designed to support and promote the well-being of the client;
4. Providing appropriate referrals to formal and informal services and resources—within or outside of formalized care plans—while engaging in problem-solving and client advocacy.

Preceptors are requested to meet with the student on a regular basis during the clinical experience to monitor progress and address areas of learning need.

Preceptors will also be requested to provide written feedback about the student’s performance to the student’s university instructor at the completion of the clinical experience.

The Preceptor’s signature below indicates this document has been received and reviewed.

Preceptor Signature ____________________________ Date ____________________________

Thank you for consenting to supervise our student during the clinical experience semester.
Submission options: 1) print, sign, scan, and email; or 2) for electronic signature, email with the Preceptor’s typed name in signature area via Preceptor’s email to the instructor’s UF email address: ljp@ufl.edu.

**PROFESSIONAL DEVELOPMENT: PRACTICAL EXPERIENCE IN GERIATRIC CARE MANAGEMENT GEY 6936**

**JOURNAL TEMPLATE – TABLE FORMAT**

Please use only this template format for your journal entries. It is designed to facilitate your documentation process. Please aim to develop a minimum of 1 page per submission, excluding the activity chart. [You may delete this paragraph in your submissions.]

Dates: [Insert the dates this journal covers]

A. REQUIRED

Summary of the Week’s Activities (objective) and distribution of time/activities.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Objective Description</th>
<th>Time Spent on the Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client Interviewing:</td>
<td></td>
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<tr>
<td>Client Assessment:</td>
<td></td>
<td></td>
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<tr>
<td>Care Plan Development, Monitoring, Evaluation, and Modification:</td>
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<td></td>
</tr>
<tr>
<td>Referral to Formal and Informal Services and Resources:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other activities not specific to or on behalf of a particular client situation.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Training/orientation, research, marketing, networking, travel, etc.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total hours spent on site this period (figure should correspond to timesheet section)

B. REQUIRED

Observations, reflections, commentary (Subjective Narrative)
Dates: [Insert the dates this journal covers]

A. REQUIRED

Summary of the Week’s Activities (objective) and distribution of time/activities.

**Activity Please refer to syllabus for definitions.**

Client Interviewing (description of activities):
Time Spent:

Client Assessment (description of activities):
Time Spent:

Care Plan Development, Monitoring, Evaluation, and Modification (description of activities):
Time Spent:

Referral to Formal and Informal Services and Resources (description of activities):
Time Spent:

Other activities not specific to or on behalf of a particular client situation (description of activities):
Time Spent:

Total hours Spent on site (figure should correspond to timesheet tally for the week):

B. REQUIRED

Observations, reflections, commentary (Subjective Narrative)
**EXAMPLE TIME SHEET**

Student Name: ___________________________ Site: ___________________________

Minimum Requirement: 50 hours on site. Must include direct client contact and involvement in professional geriatric care management activities as outlined in the course syllabus. Record here the number of hours spent on site each day. Record in your weekly journals how you spent your time on site and in which activities.

Record here the number of hours in which you’re engaged in GCM activities, on-site each day you’re there. Please record in whole and half-hour (.5) increments only.

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I assert that the time recorded above is a true and accurate representation of my hours on site during this term.

Student Signature: ___________________________ Date Signed: ___________________________

**Verification by Site Preceptor:**

Preceptor’s Signature: ___________________________ Date Signed: ___________________________
Professional Development: Practical Experience in Geriatric Care Management
GEY 6936

SUMMARY OF PRACTICAL EXPERIENCE – REQUESTED FORMAT

- No cover page needed
- Typed, single-spaced, 1-inch margins, 10- to 12- point typefaces only.
- Headers with your name, page numbers, and semester are requested.
- Minimum 5 pages in length, maximum 7 pages. Will not review past page 7.

Please use the following headings to structure your five- to seven-page Summary.

I. Description of Site
   A. Thoroughly describe the agency or business, including the location, the clientele, and the services provided.
   B. Identify by position the individuals/job positions within the agency or business and discuss their roles and work activities in relationship to geriatric care management. Include your understanding of how these job positions to work within the context of geriatric care/care management at your site. Describe the collaboration you observed among these staff positions and the personnel.

II. Activities and Experiences
   A. Retrospectively expand on the experiences you’ve reported on throughout the semester. How have you developed as a professional over the course of the term? What have your experiences taught you?
   B. Summarize your experiences in each of the required areas listed here. Include here a statement of the total times spent on each (should be 10 or more hours). (Estimated length: three pages or more).
      1. Participation in face-to-face client interviews (Number of hours)
      2. Participation in client assessment (Number of hours)
      3. Involvement in Care Plan development, monitoring, evaluation, and modification as needed (Number of hours)
      4. Referral to formal and informal services and resources (Number of hours)
      5. In addition, please share your experiences in these activities:
         Involvement in other activities you participated in such as client advocacy, problem solving, marketing, networking, or other business aspects of the practice of geriatric care management.

III. Feedback and Expectations.
   A. Reflect on your experience of this program as a whole. The following are suggested points to include. You may include any additional points as you wish.
      1. What was your experience in the program like?
      2. What had you expected to learn vs. what you did learn?
      3. How well-prepared were you for your practical experience?
      4. What aspects of the program might be improved or enhanced?
      5. What areas might need expansion?
      6. Discuss your anticipated future in activities in the field of Geriatric Care Management subsequent to your completion of this program.

Thank you!
Dear Colleague:

Thank you for hosting our student during the clinical experience portion of our program. We ask that you here provide an evaluation of our student, related to performance of geriatric care management activities while under your supervision. This PDF form is Fill-and-Sign for your convenience and may be returned via email to ljp@ufl.edu from your email account. If printing and completing a hard copy is preferable, you are welcomed to scan and return by email. Regular mail is also acceptable, though regular mail may not permit the timely return of the document. A physical address will be provided upon request, as will a fax number. As a hosting preceptor, you may discuss this evaluation with the student at your discretion.

Please note that evaluations are due back to the instructor no later than the final week of the semester. Students have been asked to ensure that they are returned by the due date to meet grading schedules. Please feel free to attach additional pages as needed.

Student: ____________________________________________________________

Site: __________________________________________________________________

Preceptor completing this evaluation

In your evaluation of the following aspects of clinical work, please note any particular areas of student strength and/or areas in need of further development. In rating, please use 1 as Low and 5 as High.

1. Quality of interaction with clients and family members, where applicable.
   Comments: _________________________________________________________

   Low 1 2 3 4 5

2. Relationship with supervisor(s), colleagues, and other professionals. Interpersonal effectiveness. Response to supervision and constructive criticism.
   Comments: _________________________________________________________

   1 2 3 4 5
3. Professional and ethical behavior.
Comments:

4. Readiness for work in the field of Geriatric Care Management.
Comments:

5. Additional comments and observations regarding the student and his or her performance during this clinical experience.

Have you discussed this evaluation with the student?  Yes  No

Please confirm the following: Over the course of the semester

The student participated in at least 10 hours of face-to-face client interviews.  Yes  No

The student participated at least 10 hours of client assessment activities.  Yes  No

The student participated in at least 10 hours of care planning.  Yes  No

The student participated in at least 10 hours of providing information and referral to formal and informal services and resources.  Yes  No

Please share any additional feedback, concerns, or comments on areas not addressed in this evaluation.

Preceptor Signature (Print and sign to Scan or Type to email) Date

Evaluations received from the Preceptor’s email address will be considered electronically signed.
Thank you for your time and assistance in helping our program strive for excellence.

**Preceptor’s Feedback on the Certificate Program**
(Optional Information)

We are interested in your opinion of how well you feel the GCM program has prepared the student for work in geriatric care management. Based upon the student’s performance during the semester, what areas did the student appear prepared for, and what areas appear to need more emphasis in our program?