

UNIVERSITY HEALTH NETWORK/ MCGILL UNIVERSITY HEALTH CENTRE HIV ADVANCED (YEAR 2) RESIDENCY PROGRAM

THERAPEUTIC DRUG MONITORING ROTATION - RESIDENT ASSESSMENT FORM

REPORT COVERS PERIOD FROM: _____ TO _____

NAME OF RESIDENT: _____ NAME OF PRECEPTOR: _____

COMPLETED BY: Preceptor ____ Resident ____ (check one) THIS IS A ____ MIDPOINT OR ____ FINAL ASSESSMENT (check one)

PRECEPTOR CHECKLIST At the start of the rotation, I have reviewed:

Resident's personal learning objectives

Final assessment of the previous clinical rotation (strengths / areas for improvement)

ROTATION OUTCOMES:

The resident will develop the clinical knowledge, skills, and professional values to:

- A. Interpret antiretroviral plasma concentrations and make recommendations to optimize therapy
- B. Provide medication- and practice-related education
- C. Manage one's own practice of pharmacy
- D. Lead a therapeutic drug monitoring (TDM)-related project

KNOWLEDGE CONTENT:

In this rotation the following drugs, disease states and clinical skills were discussed or developed:

Drug therapies	Disease States	Clinical Skills

***Designated level of performance** = at the end of the rotation the resident will be able to independently interpret plasma concentrations from moderately complex cases. Moderately complex problems have either complex drug related knowledge required (ie. drug resistance, genotypic inhibitory quotients) or involves special populations (ie. pregnancy, pediatrics, hepatic impairment, etc).

****Midpoint assessment:** may be completed verbally unless the resident is experiencing significant challenges; in such cases, a written assessment form should be completed by both the resident & preceptor, and include an action plan to address concerns.

Evaluations may be based on the following:

- resident/preceptor discussion
- review of patient workups/therapeutic plans
- review of written chart documentation
- observation of resident interaction with health care team member
- team member feedback on resident performance
- completion of incident / accident reports
- TDM-related project, including development of protocols/algorithms, policies, etc.

	1	2	3	4	5	NOT OBSERVED
A. ACADEMIC/CONTENT KNOWLEDGE						
Medication knowledge (PK/ PD properties and relationships of antiretrovirals (ARV), factors that influence PK variability for a given ARV)	☐ Inadequate fund of knowledge to apply to the interpretation of TDM results at the designated level of performance*	☐ Superficial fund of knowledge to apply to interpretation of TDM results at the designated level of performance.	☐ Satisfactory fund of knowledge to interpret effectively most TDM results at the designated level of performance.	☐ Substantial fund of knowledge to interpret consistently and effectively all TDM results at the designated level of performance.	☐ Exceptional fund of knowledge to interpret consistently and perceptively all TDM results at the designated level of performance.	☐
Therapeutic drug monitoring (TDM) knowledge	☐ Inadequate fund of knowledge to describe the literature that supports antiretroviral TDM.	☐ Superficial fund of knowledge to describe the literature that supports TDM.	☐ Satisfactory fund of knowledge to describe the literature that supports antiretroviral TDM.	☐ Substantial fund of knowledge to describe precisely and effectively the literature that supports antiretroviral TDM. Is able to identify some limitations of	☐ Exceptional fund of knowledge to describe precisely and effectively the literature that supports antiretroviral TDM. Able to describe adequately all limitations of	☐

				antiretroviral TDM.	antiretroviral TDM.	
Ethical, Legal and Standards of Practice Knowledge	<input type="checkbox"/> Inadequate funds of knowledge in any or all three domains to practice within appropriate perimeters at the designated level of performance.	<input type="checkbox"/> Superficial funds of knowledge in any or all three domains to practice within appropriate perimeters at the designated level of performance.	<input type="checkbox"/> Satisfactory funds of knowledge in all three domains to practice within appropriate perimeters at the designated level of performance.	<input type="checkbox"/> Substantial funds of knowledge in all three domains to practice within appropriate perimeters at the designated level of performance.	<input type="checkbox"/> Exceptional funds of knowledge in all three domains to practice consistently and perceptively ensuring best practices at the designated level of performance.	<input type="checkbox"/>
Justify your rating using concrete examples (MANDATORY):						

	1	2	3	4	5	NOT OBSERVED
B. CLINICAL SKILLS						
Calculating and choosing pertinent PK / PD parameters (Cmin, GIQ, wGIQ, vIQ, IIP)	<input type="checkbox"/> Fails consistently to calculate the PK/PD parameters correctly. Is unable to choose the pertinent PK/PD parameters for specific situations.	<input type="checkbox"/> Has difficulty calculating PK/PD parameters. Many results are inappropriate. Often is unable to choose the pertinent PK/PD parameters for specific situations.	<input type="checkbox"/> Appropriately calculates most PK/PD parameters. Shows some difficulties in choosing the best PK/PD parameters for specific situations.	<input type="checkbox"/> Appropriately calculates most PK/PD parameters. For most cases, chooses the best PK/PD parameters for specific situations.	<input type="checkbox"/> Consistently calculates correctly all PK/PD parameters. Always chooses the best PK/PD parameters for specific situations.	<input type="checkbox"/>
Data analysis	<input type="checkbox"/> Fails to discern relevant from irrelevant clinical data; significant data is overlooked and/or difficulty is experienced in interpreting the available data.	<input type="checkbox"/> Discerns some relevant clinical data, but not enough to allow appropriate decision making. Some significant data may be overlooked or misinterpreted.	<input type="checkbox"/> Discerns sufficient relevant clinical data to allow appropriate decision making.	<input type="checkbox"/> Discerns most relevant clinical data and seeks at times supplementary data (ie: viral load, CD4+, biochemistry, resistance). Integrates most data appropriately.	<input type="checkbox"/> Precisely discerns the relevant clinical data and often seeks supplementary data (ie: viral load, CD4+, biochemistry, resistance). Weighs alternatives, justifies choices, synthesizes and integrates all data correctly.	<input type="checkbox"/>

	1	2	3	4	5	NOT OBSERVED
Develop a Therapeutic Plan (TDM recommendations) and decision making	<input type="checkbox"/> Recommendations are incomplete or inappropriate. Often poor clinical judgement, difficulty in arriving at correct decisions. Recommendations are never justified appropriately.	<input type="checkbox"/> Recommendations are frequently incomplete or superficial. Sometimes shows poor clinical judgement; some difficulty in decision making. Has difficulties justifying the recommendations.	<input type="checkbox"/> Recommendations are usually complete, appropriate, and reflect the current standards of practice. Shows good clinical judgement and usually makes sound decisions. Recommendations are often justified.	<input type="checkbox"/> Recommendations are complete, appropriate, reflect the current standards of practice and are presented in a logical manner. Good clinical judgement and problem solving skills. Most recommendations are justified and referenced when appropriate.	<input type="checkbox"/> Recommendations are consistently complete, appropriate, reflect the current practice and are presented in a logical manner. Excellent clinical judgement; consistently arrives at right decision even for complex cases. All recommendations are justified and referenced when appropriate.	<input type="checkbox"/>
Establish and implement monitoring/follow-up plan	<input type="checkbox"/> Recommendations rarely or never include a follow-up plan. Plans are incomplete or inappropriate; significant monitoring parameters are overlooked.	<input type="checkbox"/> Recommendations sometimes include a follow-up plan. Plans are frequently incomplete or superficial; some significant monitoring parameters may be overlooked.	<input type="checkbox"/> Recommendations include a follow-up plan. Plans are usually complete, appropriate, and reflect the current standards of practice; most monitoring parameters are correctly identified.	<input type="checkbox"/> Recommendations include a follow-up plan. Plans are complete, appropriate, and reflect the current standards of practice; all monitoring parameters are correctly identified.	<input type="checkbox"/> Recommendations include a follow-up plan. Plans are consistently complete, appropriate, and reflect the current practice; all monitoring parameters are correctly identified, strategically considering all aspects of patient care and logistics.	<input type="checkbox"/>
TDM queries (content)	<input type="checkbox"/> Often provides inaccurate and incomplete TDM-related information to	<input type="checkbox"/> Sometimes provides inaccurate and incomplete TDM-related information to	<input type="checkbox"/> Usually provides accurate and complete TDM-related information to	<input type="checkbox"/> In most cases provides accurate and complete TDM-related information to	<input type="checkbox"/> Consistently provides accurate and comprehensive TDM-related information to	<input type="checkbox"/>

	1	2	3	4	5	NOT OBSERVED
	health care professionals. Responses to questions are not given in a timely manner.	health care professionals. At times, responses to questions may not be given in a timely manner.	health care professionals in a timely manner. May require some assistance for complex cases.	health care professionals in a timely manner and with little to no assistance.	health care professionals in a timely manner and with little to no assistance	
Justify your rating using concrete examples (MANDATORY):						
C. COMMUNICATION SKILLS						
TDM documentation (e.g. written interpretation reports)	<input type="checkbox"/> Often inaccurate, incomplete, disorganized and/or confusing; almost always difficult to understand.	<input type="checkbox"/> Sometimes inaccurate, incomplete, disorganized and/or confusing; many reports are not presented in a clear, understandable way.	<input type="checkbox"/> Usually accurate, complete, adequately organized and referenced and presented in a clear, understandable way.	<input type="checkbox"/> In most cases, accurate, complete, adequately organized and referenced, and presented in a clear, concise, and understandable way.	<input type="checkbox"/> Consistently accurate, comprehensive, coherently organized, concise, and referenced; excellent command of expression.	<input type="checkbox"/>
Verbal communication with: • Caregivers • Other pharm. and staff	<input type="checkbox"/> Often difficult to follow and/or hard to understand and/or inappropriate for the specific individual(s).	<input type="checkbox"/> Sometimes superficial, rambling and not always understandable or inappropriate for the specific individual(s).	<input type="checkbox"/> Usually adequately organized and understandable and appropriate for the specific individual(s).	<input type="checkbox"/> In most cases appropriately and effectively focused, organized and delivered; consistently clearly expressed and appropriate for the specific individual(s).	<input type="checkbox"/> Precisely focused, coherently organized, clearly and succinctly expressed and always appropriate for the specific individual(s).	<input type="checkbox"/>
Justify your rating using concrete examples (MANDATORY):						
D. PROGRAM MANAGEMENT / DEVELOPMENT (TDM-related project)						
Project	<input type="checkbox"/> The TDM-related project is not	<input type="checkbox"/> Completes the assigned TDM-	<input type="checkbox"/> Completes the assigned TDM-	<input type="checkbox"/> Completes the assigned TDM –	<input type="checkbox"/> Completes the assigned TDM-	<input type="checkbox"/>

	1	2	3	4	5	NOT OBSERVED
	completed during the rotation. The resident is not motivated or interested in the project. The quality of the work is poor. The resident has difficulties with the scientific-thought process.	related project during the rotation but with difficulty. Needs substantial assistance. Is not always motivated or interested in the project. The quality of the work is not always satisfactory and the resident shows at times difficulties with the scientific-thought process.	related project during the rotation and shows some motivation and interest for the project. The quality of the work is satisfactory.	related project during the rotation without difficulty. Shows substantial motivation and interest for the project. The quality of the work is very good. Demonstrates a good command of the scientific-thought process.	related project during the rotation easily and for the most part independently. Shows excellent motivation and interest for the project. The quality of the work is excellent. Demonstrates an excellent command of the scientific-thought process.	

Justify your rating using concrete examples (MANDATORY):

E. PROFESSIONAL AND INTERPERSONAL BEHAVIOURS

Interpersonal Team Relationships	<input type="checkbox"/> Behaviour interferes with the working of the team; discourteous to other members of the team; undermines team; may be condescending, patronizing, passive or aggressive.	<input type="checkbox"/> Poor team player, behaviour does not facilitate the working of the team, difficulty communicating with team members; may fail to take appropriate responsibility for own contribution to the team.	<input type="checkbox"/> Active member of the team who works well with other members, but whose leadership skills are underdeveloped.	<input type="checkbox"/> Good, active team player with developing leadership qualities.	<input type="checkbox"/> An active member of the team whose leadership qualities are recognized by others; able to achieve best results in difficult situations without antagonizing others.	<input type="checkbox"/>
Sense of responsibility	<input type="checkbox"/> Not responsible; does less than prescribed work; needs repeated reminders.	<input type="checkbox"/> Cannot always be depended upon; needs reminders sometimes.	<input type="checkbox"/> Dependable; reliable; honest; prompt.	<input type="checkbox"/> Takes initiative; acts independently; always completes assigned tasks; reliable and honest.	<input type="checkbox"/> Very conscientious, consistently displays exceptional attention to duties and is prepared to give	<input type="checkbox"/>

	1	2	3	4	5	NOT OBSERVED
					extra time willingly.	
Self-Assessment Ability (Insight)	<input type="checkbox"/> Unaware of own limitations; does not seek feedback; unable to request required assistance; unable to take advice professionally.	<input type="checkbox"/> Inconsistent awareness of own limitations; some difficulty seeking feedback and taking advice professionally.	<input type="checkbox"/> Usually aware of own limitations; often seeks feedback and/or assistance to overcome deficiencies.	<input type="checkbox"/> Aware of own limitations; seeks feedback regularly and acts to improve behaviour.	<input type="checkbox"/> Well aware of own limitations; raises constructive questions; seeks feedback to excel.	<input type="checkbox"/>

Justify your rating using concrete examples (MANDATORY):

RESIDENT'S PERSONAL LEARNING OBJECTIVES FOR THIS ROTATION

Please assess whether the resident's personal learning objectives were met during the rotation

ASSESSMENT OF PERFORMANCE	Unmet	Partially Met	Met	NOT OBSERVED
List personal learning objectives				
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

FINAL ROTATION ASSESSMENT OF RESIDENT

Evaluation Domain	Domain Average	Weighting	Sub-Total
A: Academic / Content Knowledge	/5	X1	/5
B: Clinical Skills	/5	X2	/10
C: Communication Skills	/5	X1	/5
D: Program management / development (TDM-related project)	/5	X1	/5
E: Professional/ interpersonal behaviours	/5	X1	/5
		Total:	/30

Overall Grade:

- HONOURS (Average ≥ 3.0 in each domain and total $\geq 24/30$)
- PASS (Average ≥ 3.0 in each domain and total $< 24/30$)
- FAIL (Average < 3.0 in any domain)

RESIDENT COMMENTS (INCLUDING STRENGTHS, AREAS TO IMPROVE):

PRECEPTOR COMMENTS (INCLUDING STRENGTHS, AREAS TO IMPROVE):

Resident signature:	Date:
Preceptor signature:	Date:

Please submit resident & preceptor final assessment (and midpoint if needed) by the last day of the rotation. Please complete “Practice Based Teaching Activity Assessment Forms” if applicable. IMPORTANT – At the start of a new rotation, the resident must share the summative comments from this assessment form with their new rotation preceptor. This serves as preceptor-to-preceptor communication of resident’s strengths and areas for improvement.

Adapted with permission from Trillium Health Centre, June 2011.

Last updated June 2026.