

# Orientation Action Plan for the Preceptor

## INTRODUCTIONS

### • Preceptor:

- Name, role, degree, certifications (if applicable)
- Experience within current practice setting (include years of service & roles/responsibilities)
- Experience within institution (identify any current or previous roles)
- Experience outside the institution (identify any current or previous roles)

### • Orientee:

- Name, role, degree, certifications (if applicable)
- Previous professional experiences
- Preferred learning style(s) (can complete the VARK Questionnaire if unsure)
  - ♦ [VARK Learning Style Questionnaire: How do you learn best? \(vark-learn.com\)](http://vark-learn.com)

### • Departmental Introduction

- Tour of the department
- Create and/or review a checklist of important locations within the department
  - ♦ Examples include but are not limited to nurses' station, medication room, code carts, emergency equipment (ie, fire extinguishers, gas shut-off valves), emergency exits, kitchen(s) for staff and/or patients/families, bathrooms, breakroom(s)
- Provide an overview of the Competency-based Orientation (CBO) Manual or establish list(s) of clinical needs if a CBO Manual is not available
  - ♦ See below in "Planning Learning Activities" for considerations of clinical needs
- Identify colleagues within the interprofessional team that you interact with most frequently
- Outline the roles and expectations of the nurses within your department

### • Institutional Introduction (for the orientee new to the institution)

- Tour of the hospital
- Create a checklist of important locations within the hospital
  - ♦ Examples include but are not limited to practice settings your department interacts with most frequently (ie, preop, PACU, ICU, Emergency Department), laboratory services, pathology, blood bank, pharmacy, the cafeteria

## IDENTIFY & ASSESS

### • Areas of Comfort: previous orientee experiences

- Clinical situations of comfort
- Common patient populations from previous experiences
- Communication skills (consider both verbal and written communication)

### • Anticipated Educational Needs: consider situations of limited exposure during previous professional or educational experiences

- New team of interprofessional colleagues
- Difficult situations, such as unexpected clinical decline or code situations
- Uncommon or unfamiliar patient populations
- Emerging/new technologies

### • Orientation Goals

- Utilize the SMART format for establishing goals
  - ♦ Specific, Measurable, Attainable, Relevant, Time-bound
- Establish goals on a weekly basis, monthly basis, and for the orientation in general

## PLAN LEARNING ACTIVITIES

- **Clinical Competence**

- Observe bedside practices
- Elicit responses to questions that promote critical, creative, and practical thinking and exhibit clinical competence (examples below)
  - ♦ Critical thinking: how can our hospital policy be implemented for this patient?
  - ♦ Creative thinking: what are some of the strategies we could implement to ensure patient compliance with our policy?
  - ♦ Practical thinking: what are some challenges we could anticipate when working with the patient diagnosed with \_\_\_\_\_?

- **Patient Experiences: utilize the CBO Manual (if available) or create a checklist of patient opportunities to ensure experience with during the orientation phase**

- This checklist should include, but is not limited to common procedures and patient diagnoses, age groups of patients, cultural considerations for care
- Collaborate with the charge nurse regarding patient assignments to ensure opportunity for these experiences

- **Interprofessional Experiences: create a list of important members of the interprofessional team, as well as their roles and responsibilities**

- This list should include, but is not limited to attending physicians, fellows, anesthesiologists/ CRNAs, other nurses, unlicensed assistive personnel (if applicable)

## REVIEW/SHARE

- **CBO manual (if applicable)**

- **Commonly used policies & procedures, clinical practice guidelines**

- **Educational resources/tools**

- Unit-based educator(s) and programs
- Institutional education offerings

## EVALUATION

- **Provide guidance and support during the orientation phase**

- **Identify strengths and opportunities for growth**

- **Provide concrete, in-the-moment feedback (or as close to the moment as possible)**

- **Reflect on goals at their deadline**

- Have they been met?
- Were there any barriers to meeting those goals? If so, what were they?
- Does there need additional clinical experiences or education provided?

- **Recognize when to step back as a preceptor and provide independent practice opportunities**

- Orientee should be exhibiting competent clinical practice at the bedside for allowance of independent practice