



# Red Light, Green Light and Potholes, Oh MY!

## Repaving Our Orientation Process

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### Background

No formal process for preceptors to document or communicate RN new graduate orientation process. This resulted in:

- ◆ Late identification of problems and issues
- ◆ Communication gaps and associated frustration from preceptors, new grads, and leadership
- ◆ Extended orientation times
- ◆ Increased costs related to longer orientation

Note: Standard Critical Care orientation length is 12 weeks for all units except ICU which is 16 weeks

### Hypothesis

If we develop a tool to allow the preceptors to document progress throughout orientation and hold regular progress meetings, then problem areas will be identified and addressed promptly decreasing frustration and extended orientation lengths for new grads.

### Tool Development

Collaborated with unit leadership to determine performance categories:

- ◆ Time Management
- ◆ SBAR
- ◆ Critical Thinking
- ◆ Technical Skills
- ◆ Confidence
- ◆ Customer Service

Utilized the LEAN concept of visual management to document orientation performance

- ◆ Green = Meeting expectations
- ◆ Red = Not meeting expectations

### Preceptor Tool

- ◆ One form completed per week by preceptor and reviewed with new grad
- ◆ Performance examples are provided to assist with evaluation
- ◆ Preceptors and new grad should collaborate to determine goals to turn red categories green

**Preceptor Weekly Documentation- Critical Care (NTCU, IMCU, CVCU) - Weeks 1-6**

Preceptee \_\_\_\_\_ Preceptor \_\_\_\_\_ Unit \_\_\_\_\_ Date \_\_\_\_\_

	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6
Expected # of patients cared for by Preceptee (guidelines only)		1	1-2	1-2	2-3 CVCU 2-3 IMCU/NTCU	2-3 IMCU/NTCU
Actual # of patients cared for by Preceptee						

**Preceptor Instructions**  
In relation to the week of orientation, initial each category and mark the appropriate check box for each category that best describes whether the Preceptee is on track to practice safely and independently at the end of orientation

Category	Red	Green
<b>Time Management</b> Meets expectations: <input type="checkbox"/> Consistently <input type="checkbox"/> Usually with occasional coaching <input type="checkbox"/> Sometimes with much coaching <input type="checkbox"/> Rarely <input type="checkbox"/> Never Preceptor's Initials: _____	<b>Performance Examples</b> • Consistently needs assistance from Preceptor • Unable to delegate or delegates inappropriately • Often misses breaks and lunches • Documentation is consistently late • Other	<b>Performance Examples</b> • Occasionally needs assistance from Preceptor • Delegates with prompting from Preceptor • Takes breaks and lunches but may need to be reminded • Documentation is routinely timely • Other
<b>SBAR</b> Meets expectations: <input type="checkbox"/> Consistently <input type="checkbox"/> Usually with occasional coaching <input type="checkbox"/> Sometimes with much coaching <input type="checkbox"/> Rarely <input type="checkbox"/> Never Preceptor's Initials: _____	<b>Performance Examples</b> • Report is disorganized or missing key elements and is not improving over time • Consistent end of shift overtime due to length of report • Other	<b>Performance Examples</b> • SBAR report improving • Able to answer most questions posed by oncoming RN • Other
<b>Critical Thinking</b> Meets expectations: <input type="checkbox"/> Consistently <input type="checkbox"/> Usually with occasional coaching <input type="checkbox"/> Sometimes with much coaching <input type="checkbox"/> Rarely <input type="checkbox"/> Never Preceptor's Initials: _____	<b>Performance Examples</b> • Relies on Preceptor to prioritize • Completely task focused • Relies on Preceptor to recognize changes in patient's condition • Inability to develop plan of care • Other	<b>Performance Examples</b> • Prioritizes patient care appropriately with input from Preceptor • Increasing ability to interpret data and draw a conclusion • Increasing ability to recognize changes in patient's condition • Beginning to see the "big picture"
<b>Technical Skills</b> Meets expectations: <input type="checkbox"/> Consistently <input type="checkbox"/> Usually with occasional coaching <input type="checkbox"/> Sometimes with much coaching <input type="checkbox"/> Rarely <input type="checkbox"/> Never Preceptor's Initials: _____	<b>Performance Examples</b> • Lacks ability to perform routine skills even after instruction • Appears disorganized • Other	<b>Performance Examples</b> • Completes routine skills competently with some coaching • Displays confidence • Other
<b>Confidence</b> Meets expectations: <input type="checkbox"/> Consistently <input type="checkbox"/> Usually with occasional coaching <input type="checkbox"/> Sometimes with much coaching <input type="checkbox"/> Rarely <input type="checkbox"/> Never Preceptor's Initials: _____	<b>Performance Examples</b> • Displays a lack of confidence in ability to make decisions independently and not improving • No improvement in confidence when working with patients, families, physicians or other colleagues • Other	<b>Performance Examples</b> • Gaining confidence when working with patients, families, physicians and other colleagues • Gaining confidence in nursing judgment • Other
<b>Customer Service/Interpersonal Skills</b> Meets expectations: <input type="checkbox"/> Consistently <input type="checkbox"/> Usually with occasional coaching <input type="checkbox"/> Sometimes with much coaching <input type="checkbox"/> Rarely <input type="checkbox"/> Never Preceptor's Initials: _____	<b>Performance Examples</b> • Does not introduce self to patient • Does not make eye contact with patients/families during conversations • Gets defensive when feedback and constructive criticism is given by preceptor • Is not willing to answer call lights or gets irritated when asked to do something by patient or staff • Complains • Other	<b>Performance Examples</b> • Introduces self to patient/family • Makes eye contact during conversations and listens to what is being said • Easily converses with patient and other staff members • Accepts feedback willingly • Has positive attitude about helping others (patients/staff/preceptor/etc...) • Doesn't complain • Other

For **Red** categories, please explain why: \_\_\_\_\_  
Plan to address **Red** categories: \_\_\_\_\_  
Preceptee: \_\_\_\_\_ Preceptor: \_\_\_\_\_ Manager/ANM: \_\_\_\_\_

Category	Red	Green
<b>Technical Skills</b> Meets expectations: <input type="checkbox"/> Consistently <input type="checkbox"/> Usually with occasional coaching <input type="checkbox"/> Sometimes with much coaching <input type="checkbox"/> Rarely <input type="checkbox"/> Never Preceptor's Initials: _____	<b>Performance Examples</b> • Lacks ability to perform routine skills even after instruction • Appears disorganized • Other	<b>Performance Examples</b> • Completes routine skills competently with some coaching • Displays confidence • Other
<b>Confidence</b> Meets expectations: <input type="checkbox"/> Consistently <input type="checkbox"/> Usually with occasional coaching <input type="checkbox"/> Sometimes with much coaching <input type="checkbox"/> Rarely <input type="checkbox"/> Never Preceptor's Initials: _____	<b>Performance Examples</b> • Displays a lack of confidence in ability to make decisions independently and not improving • No improvement in confidence when working with patients, families, physicians or other colleagues • Other	<b>Performance Examples</b> • Gaining confidence when working with patients, families, physicians and other colleagues • Gaining confidence in nursing judgment • Other
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For **Red** categories, please explain why: \_\_\_\_\_  
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Preceptee: \_\_\_\_\_ Preceptor: \_\_\_\_\_ Manager/ANM: \_\_\_\_\_

### Progress Meetings

**Progress Meeting**

Orientee \_\_\_\_\_ Date \_\_\_\_\_  
Preceptor \_\_\_\_\_ Orientation week # \_\_\_\_\_  
Number of patients cared for each week \_\_\_\_\_  
Perception of progress: \_\_\_\_\_  
New learning experiences: \_\_\_\_\_

	Never	Rarely	Sometimes with much coaching	Usually with occasional coaching	Consistently
Time Management					
SBAR					
Critical Thinking					
Technical Skills					
Confidence					
Customer Service/Interpersonal Skills					

What learning/orientation needs do you have?  
Plan for learning/ orientation needs:  
Follow up on needs identified at last meeting:  
Preceptee: \_\_\_\_\_ Manager/ANM/PDS: \_\_\_\_\_

- ◆ Progress meetings are held every three weeks during orientation.
- ◆ Scheduled and facilitated by the Nursing Professional Development Specialist (PDS)
- ◆ Participants include: Preceptor, new grad, unit leadership representative and PDS
- ◆ Weekly preceptor tools reviewed and discussed
- ◆ New learning opportunities are identified which ensures each new grad is getting the variety of patient experiences they need.
- ◆ Specific goals are set for the next 3 weeks to guide orientation. These are usually determined by areas that are in the red.
- ◆ Subsequent progress meetings start with a review of the previous goals, if they have been achieved or barriers encountered
- ◆ Entire team sets and agrees upon goals for the next three weeks
- ◆ At the end of orientation, all forms are placed into the employee's file to show documented progress during the orientation period.

### Outcomes

- ◆ Timely problem identification
- ◆ Fewer incidences of extending orientation
- ◆ Overall shorter orientation period
- ◆ Improved satisfaction preceptor, new grad, unit leadership and PDS
- ◆ ROI of 1262% in Critical Care units

### ROI

Costs	
Paper	0.13/page x 615 pages= \$79.95
Time: 30 min per progress meeting x average salary for new grad, preceptor, PDS, and leadership representative	\$84/meeting x 76 meetings= \$6,384
Savings	
Weeks saved of orientation	\$1260 (weekly salary) x 69 weeks saved = \$86,940

$$\frac{\$86,940 - \$6384}{\$6384} = 12.62 \times 100 = 1,262\%$$

### References

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Riegel, E. M. (2013). Orienting a new generation of nurses: Expectations of the millennial new graduate. Open Journal of Nursing, 416-466. doi.dx.doi.org/10.4236/ojn.2013.37062.



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