

Manager Orientation Checkpoint (MOC) Packet

Orientee Name: _____

Hire Date: ____/____/____

Orientation Timeline from Date of Hire:

Month 1: _____

Month 4: _____

Clinician 1 (only):

Month 2: _____

Month 5: _____

Month 10: _____

Month 3: _____

Month 6: _____

Month 11: _____

Purpose:

This MOC packet provides a guide to capture regular Manager/Assistant Nurse Manager oversight of Orientee's clinical progress.

Directions:

- Pre-schedule MOC meetings with Orientee (and preceptor) as far out from hire date as possible
- Provide copy of MOC packet to orientee during 1st week of hire
- Keep the MOC packet together and in the local employee file
- Attach weekly forms
- Preceptor signature is only required if orientee has an assigned 1:1 preceptor

Process:

- Plan for approximately 15-30 minutes for each meeting
- During the meeting:
 - Review progress and establish goals
 - Review Orientation Skills Validation Packet Checklist form progress
 - Determine if orientation is meeting the orientee's needs
 - Realign orientation plan to meet the orientee's needs
 - Encourage discussion and sharing of learning experiences in terms of strengths and areas for growth
 - Discuss orientee's integration into unit culture
- At the conclusion of the meeting, establish a plan that continues to support and encourage the

Auditing:

- A portion of all newly hired nurses' orientation records are audited for compliance with the UVA CH policy and process to ensure we remain survey ready!
- **Please keep the completed MOC forms in the employee's local file.**

Your time and attention is invaluable to your new hire!!

Manager Orientation Checkpoint (MOC) Packet

Orientee Name: _____

Month 1

Meeting Date: _____

Focus Area	Recommended Plan
<ul style="list-style-type: none"> • Demonstrates familiarity with environment of care • Identifies location of standards, guidelines, procedures, and policies • Identifies area/dept structures and routines • Provides basic and routine patient care • Identifies area/dept staff and interdisciplinary team members (socialization) 	<p>Patient Assignment Expectations:</p> <ul style="list-style-type: none"> • Blended preceptor/orientee assignment with orientee focusing on defined elements of patient care and/or demonstrating competency in systems assessments. (Example: focused on respiratory assessment and documentation, medication preparation and charting, IV therapy, etc....); • Orientee does not provide care without preceptor supervision. Preceptor carries bulk of patient care for entire assignment to support confidence and success of orientee in beginning patient care processes. <p>Orientee:</p> <ul style="list-style-type: none"> • Observes handover of care reports and participates in shift rounds and/or daily huddle with preceptor • Performs physical assessments with preceptor and documents in EPIC with Preceptor observation • Focuses on routine labs, medications, procedures, and begins charting vital signs, and other pertinent data • Performs basic nursing skills competently • Completes Mandatory New Employee Training modules <p>Preceptor:</p> <ul style="list-style-type: none"> • Day 1 – Orientee to follow/shadows preceptor to become familiar with overall unit routines and norms • Day 2 & 3 – Guide orientee through daily routine (assessments, labs, meds, procedures, & basic charting) • Review safety procedures <p>Manager/Assistant Nurse Manager</p> <ul style="list-style-type: none"> • Describes the role of the preceptor as orientation evaluator • Review Orientation Packet (purpose and function of MOC and Orientee/Preceptor Orientation Progress Form, orientee & preceptor evaluations, orientation plan). • Review communication standards (unit call boards, staff meetings, staff e-mail, practice news, SBAR, IDEAL) • Align preceptor(s) and orientee schedules for next 6 weeks schedule (Include any scheduled classes; see new grad NRP schedule) • Review orientation process and purpose of the Manager Orientation Checkpoint (MOC) meetings

Strengths:

Areas needing experience and/or development:

Action plan/Goals:

Orientee signature: _____

Date: _____

Preceptor signature: _____

Date: __

Manager signature: _____

Date: _____

Orientee Name: _____

Month 2

Meeting Date: _____

Focus Area	Recommended Plan
<ul style="list-style-type: none"> • Demonstrates increasing responsibility and competence in providing total patient care • Demonstrates ability to prioritize routine unit and patient care tasks • Demonstrates critical thinking skills 	<p>Patient assignment Expectations:</p> <ul style="list-style-type: none"> • Preceptor retains responsibility and direct oversight for the entire patient assignment with the orientee managing progressively greater portions of care; (25%-100% of patient load depending on level of experience) <p>Orientee:</p> <ul style="list-style-type: none"> • Performs correct general-system assessment • Performs correct & consistent documentation • Identifies Patient Education needs of assigned patients • Develops/prioritizes/updates patient plan of care for assigned patients • Begins Handover-of-Care, admit, transfer, pre & post-procedure, discharge, and transportation process for patient • Communicates appropriate pertinent patient information to physicians and other members of interdisciplinary team • Communicates appropriate information to patient & family • Correlates assessment with parameters (vital signs, labs, I&O, signs & symptoms) • Provides concise inclusive bedside handover-of-care report for assigned inpatients • Resolves previous week(s) areas for improvement <p>Preceptor:</p> <ul style="list-style-type: none"> • Start every shift by asking orientee to prioritize assessments/nursing interventions and explore rationale behind decisions • Assists orientee in finding an organizational system that fits their individual needs and meets patient care demands in a timely manner • Validates competent care by reviewing orientation skills validation packet progress and signing New Hire Competency forms. • Assesses for Reality Shock • Utilizes evidence-based practice resources and policies are referenced to reinforce UVAHS nursing standards • Coordinates additional orientation experiences per unit standard (example: respiratory therapy & wound/ostomy) <p>Manager/Assistant Nurse Manager:</p> <ul style="list-style-type: none"> • Discuss nursing quality metrics on Medical Center Dashboard • Review unit fit and comfort level with practice • Assesses for Reality Shock

Strengths:

Areas needing experience and/or development:

Action plan/Goals:

Orientee signature: _____

Date: _____

Preceptor signature: _____

Date: ____

Manager signature: _____

Date: _____

Manager Orientation Checkpoint (MOC) Packet

Orientee Name: _____

Month 3

Meeting Date: _____

Focus Area	Recommended Plan
<ul style="list-style-type: none"> Identify patterns associated with common illnesses on the unit Trend changes in patient assessment. Develop formalized plan of care Uses an organized system for prioritizing and managing the patient care assignment Demonstrates sound decision making Demonstrates delegation skills Demonstrates ability to combine patient care tasks to improve efficiency Refine practice to incorporate all aspects of the Nursing Process 	<p>Patient assignment:</p> <ul style="list-style-type: none"> Preceptor maintains peripheral oversight of patient assignment; Orientee manages typical assignment with minimal preceptor intervention and coaching; preceptor serves as a safety net. Orientee provides preceptor with outline of plans for meeting patient care needs and reports progress of care provided to preceptor. (Orientee providing 45%- 100% of patient care, depending on level of experience) <p>Orientee:</p> <ul style="list-style-type: none"> Correlate assessment & parameters with developing plan of care Collaborates with interdisciplinary resources (ex: PCA, MA, HUC, MET, RT, PT-OT, LIP, nutrition, pharmacy) Continue with orientation goals and skill acquisition as patient assignment allows Resolve previous week(s) areas for improvement Reviews Orientation Skills Validation Packet/New Hire Competency form for completion of skills Monitors/evaluates/manages pain in assigned patients according to UVACH pain guidelines <p>Preceptor:</p> <ul style="list-style-type: none"> Assesses orientee's ability to organize and prioritize patient care activities Monitors orientee's ability to meet patient care needs by assessing quality of care provided retrospectively and anticipating care needs by reviewing orders. Resource for orientee when patient care demands conflict. Remains present and available in the department for the orientee; guides orientee in practicing delegation skills. Reviews New Hire Competency form and signs off completed skills. In collaboration with Manager/Assistant Nurse Manager and orientee, makes plans for completion of skills by employee's first annual performance appraisal. <p>Manager/Assistant Nurse Manager:</p> <ul style="list-style-type: none"> Review Clinical ladder requirements Provides orientee with final orientation evaluation in collaboration with preceptor (if applicable)

Strengths:

Areas needing experience and/or development:

Action plan:

Orientee signature: _____

Date: _____

Preceptor signature: _____

Date: ____

Manager signature: _____

Date: _____

Manager Orientation Checkpoint (MOC) Packet

Orientee Name: _____

Month 4

Meeting Date: _____

Focus Area	Recommended plan
<ul style="list-style-type: none"> Identify duties that can be appropriately delegated to other members of the healthcare team Evolves efficiency of care provided becoming more fluid in providing simultaneous care tasks at once Recognizes unusual patient care situations or orders 	<p>Patient Assignment:</p> <ul style="list-style-type: none"> Independently manages full patient assignment <p>Orientee:</p> <ul style="list-style-type: none"> Collaborates with family/patient to identify expected outcomes Continue with previous bedside objectives and skill acquisition as patient assignment allows Identifies patient situations that are outside the normal and notifies shift manager or ANM Consults with other experienced clinicians to clarify patient care needs and achieve desired patient care outcomes Reviews manager communications and has attended at least one staff meeting Develop mechanism for ongoing support (e.g., mentor, buddy) Reviews New Hire Form for completion of skills and obtains needed signatures Completes all unit assigned on-line modules Actively working on prior goals <p>Manager/Assistant Nurse Manager:</p> <ul style="list-style-type: none"> Reviews orientee's progress with required clinical ladder documents Reviews progress on New Hire form and reviews established plan for completion of document

Strengths:

Areas needing experience and/or development:

Action plan/Goals:

Orientee signature: _____

Date: ____

Preceptor signature: _____

Date: ____

Manager signature: _____

Date: _____

Manager Orientation Checkpoint (MOC) Packet

Orientee Name: _____

Month 5

Meeting Date: _____

Focus Area	Recommended Plan
<ul style="list-style-type: none"> • Demonstrate autonomy in providing patient care • Demonstrate effective delegation to other members of the healthcare team 	<p>Orientee:</p> <ul style="list-style-type: none"> • Continues to independently provide patient care to full patient assignment but becoming more efficient in responding to patient care demands. • Engaging in a mentorship relationship • Actively working on prior goals <p>Manager/Assistant Nurse Manager:</p> <ul style="list-style-type: none"> • Collects required clinical ladder documents, if applicable • Reviews progress on New Hire form in preparation for first annual performance review. • Establishes plan for orientee attending/completing any needed unit-based education (examples: core curriculums, ECCO, EPCCO, Progressive Care Core Curriculum) • Reviews 5 Year Career Pathway with employee • If employee is AD RN, Review RN to BSN opportunities and programs • Set goals for continuing professional development (including obtaining BSN if needed)

Strengths:

Areas needing experience and/or development:

Action plan/Goals:

Orientee signature: _____

Date: ____

Preceptor signature: _____

Date: ____

Manager signature: _____

Date: ____

Manager Orientation Checkpoint (MOC) Packet

Orientee Name: _____

Month 6

Meeting Date: _____

Focus Area	Recommended Plan
<ul style="list-style-type: none"> Provides patient care efficiently through the use of appropriate delegation and providing simultaneous nursing care activities. 	<p>Orientee:</p> <ul style="list-style-type: none"> Actively working on prior goals Identifies a mentor and has established in a mentoring relationship Demonstrates all components of organizational duties as outlined in Job Description Demonstrates all component of Essential Duties and Responsibilities as outlined in Job Description Continues to complete identified skills on New Hire Form and obtains needed signatures <p>Manager/Assistant Nurse Manager</p> <ul style="list-style-type: none"> Tracks orientee's progress for attending/completing any needed unit-based education (examples: core curriculums, ECCO, EPCCO, Progressive Care Core Curriculum) <p>☐ Establish goals</p> <p>☐ If clinician 1:</p> <ul style="list-style-type: none"> Set Month 10 meeting. Discuss option to float based on Clin 1s readiness and desire to float. Explain the support role and floating with a full assignment. Identify if Clin 1 is off of orientation, willing to float and ready to float

Strengths:

Areas needing experience and/or development:

Action plan:

Orientee signature: _____

Date: __

Preceptor signature: _____

Date: __

Manager signature: _____

Date: __

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Orientee Name: _____

Month 10
(Clinician 1 only)

Meeting Date: _____

Focus Area	Recommended Plan
<ul style="list-style-type: none"> Review Clinician 1 to Clinician 2 advancement self-assessment tool 	<p>Orientee:</p> <ul style="list-style-type: none"> Complete advancement self-assessment tool <p>Manager/Assistant Nurse Manager</p> <ul style="list-style-type: none"> If only "Y"s are checked, establish goal for advancement to Clinician 2 after all requirements are met. If "N" is checked on the self-assessment tool: <ul style="list-style-type: none"> Discuss with Clinician 1 and create an action plan. Set meeting for Month 11 to follow-up on established plan Identify if Clin 1 is off of orientation, willing to float and ready to float if criteria was not met at month 6

Strengths:

Areas needing experience and/or development:

Action plan:

Orientee signature: _____

Date: __

Manager signature: _____

Date: __

Manager Orientation Checkpoint (MOC) Packet

Orientee Name: _____

Month 11
(Clinician 1 only – if needed)

Meeting Date: _____

Focus Area	Recommended Plan
<ul style="list-style-type: none"> Ensure established action plan for advancement has been achieved 	<p>Orientee:</p> <ul style="list-style-type: none"> Complete all needed action plan items Create Portfolio <p>Manager/Assistant Nurse Manager</p> <ul style="list-style-type: none"> Goal will be advancement to clinician 2 after all requirements are met. Discuss goals to obtain: Professional Organization Membership, Professional Board Certification, RN to BSN if applicable.

Strengths:

Areas needing experience and/or development:

Action plan:

Orientee signature: _____

Date: __

Manager signature: _____

Date: __