

Manager Orientation Checkpoint (MOC)

Orientee: _____ **Start Date:** _____

Orientation Timeline from Date of Hire:

Month 1: _____

Month 3: _____

Month 6: _____

Clinician 1 (only):

Month 10: _____

Month 12: _____

Purpose:

The 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 Preceptor Progress forms
- Preceptor signature is only required if orientee is in protected orientation with an assigned preceptor

Process:

- Plan for approximately 15-30 minutes for each meeting
- During the meeting:
 - Review progress and establish goals
 - Review OCA form progress
- Determine if orientation is meeting the orientee's needs and realign orientation plan to meet orientee's needs, if indicated
- 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 orientee to achieve independent and interdependent practitioner roles

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

Manager Orientation Checkpoint (MOC)

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>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 self-assessment on OCA form • Completes Mandatory New Employee Training modules <p>Preceptor:</p> <ul style="list-style-type: none"> • Orientee to follow/shadow preceptor to become familiar with overall unit routines and norms • 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: _____

Manager Orientation Checkpoint (MOC)

Orientee Name: _____

Month 3

Meeting Date: _____

| Focus Area | Recommended Plan |
|--|--|
| <ul style="list-style-type: none"> • Demonstrates critical thinking skills • Identifies 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 • Refine practice to incorporate all aspects of the Nursing Process | <p>Orientee:</p> <ul style="list-style-type: none"> • Performs correct general-system assessment and correlates with developing plan of care • Performs correct and consistent documentation • Identifies Patient Education needs of assigned patients • Performs 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 the interdisciplinary team • Communicates appropriate information to patient and family • Collaborates with interdisciplinary resources (ex: UAP, MA, HUC, MET, RT, PT, OT, LIP, nutrition, pharmacy) • Continues with orientation goals and skill acquisition as patient assignment allows • Resolves previous week(s) areas for improvement • Reviews OCA/New Hire Competency form for completion of skills • Monitors/evaluates/manages pain in assigned patients according to UVAHS pain guidelines <p>Preceptor:</p> <ul style="list-style-type: none"> • Assists orientee in finding an organizational system that fits their individual needs and meets patient care demands in a timely manner • Assesses for Reality Shock • Utilizes evidence-based practice resources and policies are referenced to reinforce UVAHS nursing standards • Coordinates additional orientation experiences per unit standards (ex: respiratory therapy, wound/ostomy) • 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 • Validates competent care by signing off OCA form • Remains present and available in 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 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"> • Discuss nursing quality metrics on Medical Center Dashboard • Review unit fit and comfort level with practice • Assesses for Reality Shock • 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/Goals:

Orientee Signature: _____ Date: _____ Preceptor Signature: _____ Date: _____

Manager Signature: _____ Date: _____

Manager Orientation Checkpoint (MOC)

Orientee Name: _____

Month 6

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 Demonstrate autonomy in providing patient care Demonstrates effective delegation to other members of the healthcare team 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"> Manages a full patient assignment Collaborates with family/patient to identify expected outcomes 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 Actively working on prior goals Identifies a mentor and has established in a mentoring relationship Demonstrates all components of Organizational and 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"> Collects required clinical ladder documents, if applicable Reviews progress on New Hire form in preparation for first annual performance review. Reviews 5 Year Career Pathway with employee If employee is AD RN, Review BSN Academic Progression Milestone Tool Set goals for continuing professional development (including obtaining BSN if needed) Tracks orientee's progress for attending/completing any needed unit-based education (examples: core curriculums, ECCO, EPCCO, Progressive Care Core Curriculum) If clinician 1: <ul style="list-style-type: none"> Set Month 10 meeting. Introduce and review Clin 1 Float policy. 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/Goals:

Orientee Signature: _____ Date: _____ Preceptor Signature: _____ Date: _____

Manager Signature: _____ Date: _____

Manager Orientation Checkpoint (MOC)

Orientee Name: _____

Month 10

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. Determine a timeframe for Action Plan and set/send calendar invite Identify if Clin 1 is off of orientation, willing to float and ready to float if criteria were not met at month 6 |

Strengths:

Areas needing experience and/or development:

Action Plan/Goals:

Orientee Signature: _____ Date: _____

Manager Signature: _____ Date: _____

Manager Orientation Checkpoint (MOC)

Orientee Name: _____

Month 12

Meeting Date: _____

| Focus Area | Recommended Plan |
|---|---|
| <ul style="list-style-type: none"> • Review Clinician 1 Advancement Packet Portfolio | <p>Orientee:</p> <ul style="list-style-type: none"> • Brings completed Advancement Packet Portfolio for review by Manager/Assistant Nurse Manager <p>Manager/Assistant Nurse Manager</p> <ul style="list-style-type: none"> • Reviews all items within submitted Advancement Packet Portfolio • Determine Clinician 1's readiness for advancement to Clinician 2 • Change employee's Job Function in Workday to Clinician 2 |

Comments:

Orientee Signature: _____ **Date:** _____

Manager Signature: _____ **Date:** _____