**University of Colorado Hospital Policy and Procedure**

**Registered Nurse Preceptor**

**Approved by:** Preceptor Advisory Council – Professional Resources

Professional Practice Policy and Procedure Subcommittee

Effective: 03/02

Revised: 02/13

**Description:** This policy describes the process by which employees and students are precepted and the process by which Preceptors are selected, trained and evaluated. The goal of the Preceptor program is to provide necessary guidance and instruction to increase the individual’s ability, knowledge and skills to meet orientation, training, or student objectives.

**Accountability:** Oversight of the Preceptor policies, procedures and program is the responsibility of the Preceptor Advisory Council. Elements of program management may be delegated to other committees or personnel. Managers and/or Educators are specifically responsible for ensuring the Preceptor is qualified and procedures are followed to orient, train and guide employees or students. The Preceptor is responsible for adhering to the UCH precepting model.

**Definitions:**

**Preceptor:** An employee or designee who functions as a teacher and mentor in guiding, directing, and overseeing the orientation and/or training of a designated employee or student.

**Preceptee:** A designated employee or student being oriented to or receiving a precepted experience. Designation of the Preceptee is made by the Manager, Educator, or Designee.

**Policies and Procedures:**

1. **Criteria for Primary Preceptor Selection**
2. Demonstrates competency in the position as identified by the Manager, Educator, or Designee.
3. Demonstrates effective communication, skills, and the role responsibilities associated with the job or specialty area.
4. Demonstrates an interest in sharing knowledge with care team members through role modeling and teaching.
5. Demonstrates effective interpersonal skills and supports the socialization of care team members.
6. Demonstrates strong organizational skills and ability to prioritize.
7. Completes all mandatory and assigned educational activities.
8. Demonstrates effective communication and completed the UCH Basic Preceptor Course.
9. Employed at least six months at UCH and is fully oriented to institution/department.
10. Employee has completed Preceptor Application Form, which has been reviewed and Preceptor selection approved by Manager, Educator, or Designee (Appendix B).
11. Manager, Educator, or Designee has approved and provided release for training.
12. Demonstrates self-confidence, assertiveness, responsibility, patience, enthusiasm, flexibility and support for organizational policies.
13. Performance evaluation verifies that the individual is well developed in his/her role and is in good standing.
14. After completion of the UCH Basic Preceptor Course, the Preceptor may be eligible for compensation for hours directly involved with Preceptee.
15. Completes HealthStream Competency every two years after completion of UCH Basic Preceptor Course.
16. **Preceptor Responsibilities**
17. Identifies Preceptee learning needs and style.
18. Develops goals and objectives in collaboration with the Preceptee and Manager/Educator, based on Preceptee learning needs and learning style.
19. Teaches, observes and validates skills performed by Preceptee according to standards/policy and documents on orientation checklist.
20. Progressively assigns responsibilities to the Preceptee in accordance with demonstrated competency; collaborates with Manager, Educator, or Designee and others to evaluate Preceptee progress and address educational needs.
21. Acts as a role model for the Preceptee, modeling commitment to training, professional practice, leadership, organizational support and policies.
22. Identifies any problems or barriers and refers to Manager, Educator, or Designee.
23. Provides timely and appropriate feedback to facilitate the learning process.
24. Provides written evaluation of Preceptee progress as predetermined.
25. Assists Preceptee to integrate into the work environment socially and professionally.
26. The Preceptor follows the steps outlined above and in algorithm (Appendix D).
27. **Preceptee Responsibilities**
28. Works with the Preceptor to identify learning goals and objectives.
29. Takes accountability for learning and competency including responsibility to identify additional learning needs.
30. Utilizes appropriate resource personnel including the Preceptor, Manager, Educator, or Designee to meet learning needs.
31. Evaluates the orientation/learning experience and the Preceptor by completing the Evaluation of Preceptor Form.
32. **Manager, Educator or Designee Responsibilities**
33. Oversees Preceptor application process, and selects preceptor for each orientee/student experience (Appendix A).
34. Coordinates work schedules for designated Preceptor and Preceptee.
35. Collaborates with the Preceptor and Preceptee to plan, implement and evaluate the orientation or training process/rotation.
36. Supports the Preceptor and Preceptee to assure an optimal orientation/learning experience.
37. Utilizes the Preceptor Competency Form (Appendix C) to verify baseline and ongoing Preceptor competency.
38. Uses the Preceptor Pathway to guide the orientation/training process (Appendix D).

**Documentation:**

1. Preceptor Application Form to verify Preceptor selection (Appendix B).
2. Preceptor Competency Form to verify ability to function in Preceptor role. Place a copy in employee file and send one copy to Professional Resources (Appendix C).
3. Orientation checklist or other performance evaluation forms as required by department, to document training.
4. Preceptor evaluation completed by Preceptee and returned to Manager, Educator, or Designee (Appendix E).

**References:**

Benner, P. (2001). From novice to expert. Excellence and power in clinical nursing practice. Commemorative edition. Upper Saddle River, NJ: Prentice Hall, Inc. LOE 6

Smedley, A. & Penney, D. (2009). A partnership approach to the preparation of precectors. Nursing Education Perspectives, 30 (1), 30-36. LOE 4

Unruh, L. & Nooney, J. (2011) Newly licensed registered nurses’ perceptions of job difficulties, demands and control: individual and organizational predictors. Journal of Nursing Management (19) 572-584 LOE 5

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#### Appendix B

**Preceptor Application Form**

Name of UCH Employee \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Months/Years Employed at UCH \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Unit: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

***Directions:*** This form is to be completed by the employee applying to be a Preceptor, then reviewed by Manager/Educator/Designee. If employee and Manager/Educator/Designee agree criteria for selection met, sign and place in employee personnel file. Completing this form is a required step before scheduling Basic Preceptor Course.

|  |  |  |  |
| --- | --- | --- | --- |
| **Criteria** | **Meets** | Unmet | Comments |
| Expresses interest in Preceptor role. |  |  |  |
| Has minimum six month’s experience in position. |  |  |  |
| Meets expectations for hospital, departmental, and service competencies. |  |  |  |
| Motivated to attend/complete UCH Basic Preceptor Course. |  |  |  |
| Demonstrates and promotes a positive, professional, and supportive attitude within the department as well as with other units/departments. |  |  |  |
| Demonstrates continuing professional growth through CE/education. |  |  |  |
| Demonstrates flexibility in position by accepting changes that are required to meet patient/department needs. |  |  |  |
| Documents according to departmental/service policy. |  |  |  |
| Demonstrates knowledge and use of departmental resources such as policy/procedure manuals and standards. |  |  |  |
| Demonstrates knowledge and skills of position. |  |  |  |
| Demonstrates knowledge of the department’s quality initiatives. |  |  |  |
| Demonstrates leadership skills such as prioritization, decision making, role modeling, and advocacy. |  |  |  |
| Demonstrates effective problem solving skills. |  |  |  |
| Demonstrates effective communication skills, including the ability to provide others with constructive feedback in a confidential and non-judgmental manner. |  |  |  |
| Demonstrates support and encouragement of the growth of other staff. |  |  |  |

I have reviewed the criteria to become a Preceptor and believe my performance matches this criteria. I am ready to commit to being a Preceptor for my department/service.

Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Signature:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

I have reviewed this application for Preceptor, and concur that this employee meets the requirements for my department/service.

Manager/Educator/Designee Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Signature:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |  |  |  |
| --- | --- | --- | --- |
| Appendix C | | | |
| **UNIVERSITY of COLORADO HOSPITAL**  **Preceptor Competency** | | | |
| **Performance Criteria** | **Meets Criteria**  **Please Initial** | | **Comments** |
| **Knowledge** |  |  |  |
| Attends UCH Basic Preceptor Course that includes content on:  - The role of the Preceptor  - Identification of learning style and information on how to apply knowledge to better communicate with Preceptee  - Strategies to assist an Preceptee to integrate socially and professionally into the work setting  - Forms used to orient, train and evaluate the Preceptee  - Techniques to constructively evaluate an Preceptee’s performance  - Strategies for teaching adult learners  - Communication and feedback techniques to facilitate learning  - Information about common problems in precepting. |  |  |  |
| **Skill Demonstration** |  |  |  |
| Develops a plan for orientation/student experience, with guidance of Manager/Educator/Designee. |  |  |  |
| Demonstrates ability to teach and model required skills, |  |  |  |
| Completes orientation/evaluation paperwork. |  |  |  |
| Supports socialization of Preceptee into the care team. |  |  |  |
| Acts as a professional role model. |  |  |  |
| Provides constructive feedback on a regular basis. |  |  |  |

Employee Name **(print)**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Employee #:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Unit: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Employee Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Position: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Evaluator Signature:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Initials: Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Evaluator Signature:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Initials: \_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

White Copy to Preceptor Personnel File; Yellow Copy to Professional Resources

### Appendix D

#### Preceptor Pathway for New Orientation/Training

**Preceptor Meets the Preceptee**

1. Preceptee communicates ability level
2. Education
3. Career background
4. Life experience
5. Current skills
6. Preceptor makes assessment of Preceptee’s abilities
7. Technical skills
8. Knowledge
9. Critical thinking ability

**Preceptor Plans Orientation/Student Experience with the Preceptee**

1. Reviews objectives for the day/learning experience
2. Reviews activities to meet objectives
3. Reviews skills checklist if applicable
4. Reviews work assignment to ensure it meets learning objectives
5. Sets goals and objectives with the Preceptee
6. Identifies objectives for the day/week
7. Schedules activities to meet objectives

**Preceptor Assists Preceptee to Adapt to Department**

1. Facilitates integration into the department
2. Introductions to all staff
3. Tour of department
4. Review of safety procedures
5. Review of policies and procedures applicable to department

**Preceptor Plans Activities to Meet Preceptee’s Learning Needs**

1. Supports Preceptee’s learning experience with appropriate patients, procedures, and learning experiences as applicable to department/service.
2. Assists Preceptee to complete skills checklist; observes Preceptee demonstrate skill/work related functions.
3. Documents Preceptee’s progress
4. Initials/signs orientation checklist (if applicable)
5. Assists Preceptee to complete forms and other assignments as appropriate.
6. Shares information with Manager, Educator, or Designee

**Does Preceptee Have Difficulty Meeting Goals?**

**Does Preceptee Successfully Complete Expectations?**

1. Inform Manager, Educator, or Designee
2. Objectives/required training completed
3. Skills checklist completed at meets performance expectations level.
4. Evaluation forms completed
5. Contact Manager, Educator, or Designee
6. Preceptor discusses assessment of skill deficiency and failure to meet objectives
7. Development plan is initiated as indicated
8. HR may be contacted as indicated