Orientation Program for Primary Care Nursing

Key Components for Smooth Transitions to Ambulatory Care in the Veterans Health Administration

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North Florida South Georgia VHS
Concepts

- Structured Orientations
  - Proven as an effective tool to transition nurses to the Ambulatory Care work setting

- Competency based – includes:
  - Didactic Sessions
  - Clinical Learning Opportunities
  - Adapted according to learning needs/past nursing experience
Key Components

- Evidenced Based Curriculum
- Self-study required training on system-wide processes
- Didactic sessions on nursing skills
  - CPRS training
  - Nursing procedures (i.e., dressing changes, ABI measurement, patient education)
  - Clinical Patient Flow Process (i.e., check-in, clinical reminders)
Key Components

- Clinical Learning Opportunities (i.e., *on the job training...OJT*)
- Preceptorship
  - Orientation to the clinic
  - Physical layout and location of supplies/emergency equipment
  - Introduction to key members of health care team
  - Role delineation/expectations
Essential Tools

- New Employee Orientation for Nursing (NEON)
  - Customized plan for weeks one through three
- Orientation Binder
- Primary Care Orientation Coversheet – a.k.a. – The Grocery List
- Nursing Service Competency (complete within 90–days)
- Weekly Clinical Orientation Tracking Tool
- Weekly Clinical Meetings
The Villages Outpatient Clinic (TVOPC)
New Employee Orientation
(RN or LPN) – PACT Nurse

Day 1: Thursday June 23, 2016
Time: 800-1630
Location: Room _____

1. Meet with Administrative Assistant Secretary
2. Welcome by the Nurse Manager, Assistant Chief Nurse, Nurse Educator
3. Meet with Nurse Manager
   a. Review BLS/ACLS cards, verify licensure
4. Meet with __________ AO – initiate computer access process (e-Pas)
5. Introductions to:
   a. __________ CMO
   b. PACT Coordinator – __________
6. PC Tour with Nurse Manager or Nurse Educator or preceptor
   a. VA Police – introduction and obtain door entry pass
7. Meet with Clinical Nurse Educator
   a. Introduction to the Orientation Binder (brief)
8. Scavenger Hunt – staff to complete individually
9. Neon Module Required Training Topics FY16 – independent study
10. Review for medication test
11. Plan for day #2
The Villages Outpatient Clinic (TVOPC)

New Employee Orientation

(RN or LPN) – PACT Nurse

Day 2: Friday June 24, 2016
Time: 8:00-1630
Locations: Room ________

1. Take NFSG VISN 8 Medication test
2. Complete scavenger hunt
3. Complete NEON modules
4. Complete Nursing Service Competency ranking – Independent study
5. Meet with Nurse Manager
   a. Review Functional Statement/Position Description/Performance Evaluation
   b. Complete Functional Categories Assignment and VA4092 forms
6. Complete and submit Pyxis Tutorial, Print Certificates, and complete and submit Pyxis
   User ID requests form
7. Meet with Nurse Educator
   a. Review Orientation Binder (include preceptor on this meeting)
      i. Highlight specific core competencies to be completed in first two weeks
      ii. Grade medication test and NEON self-study modules
8. Begin Competences – with preceptor
   a. Age Specific
   b. AED
   c. RME, part II
   d. Computer Downtime Contingency
9. Weekly meeting with Nurse Manager and Nurse Educator
10. Plan and preparation for week #2
The Villages Outpatient Clinic (TVOPC)
New Employee Orientation
(RN or LPN) – PACT Nurse

Day 3: Monday June 27, 2016
Time: 800-1630
Locations: Room ___

1. Meet with Nurse Manager
   a. Complete Functional Categories Assignment and VA4092 forms
   b. Schedule orientee to attend New Patient Orientation class to observe
2. Review Nursing Service Competency ranking – work with Nurse Educator
   a. Continue Competency training
   b. Plan a Skills Fair to cover core competency training
3. Self-study of supplemental training materials for core competency training
4. Begin CPRS tab-by-tab online tutorial (depending on computer access)
5. Observe check-in process with preceptor
6. Review accomplishments and debrief with preceptor at the end of the day
7. Plan upcoming week

Welcome and good luck!
OPC/CBOC ORIENTATION
TABLE OF CONTENTS
RN-LPN

I. 10 Tips for Starting Off a New Nursing Job on the Right Foot

II. Clinic Specific Documents & Miscellaneous Instruction Sheets
   a. Telephone Directory of Clinic Employees and Departments
   b. Clinic Specific Check – in Process (if applicable for assigned clinic)
   c. Morning and Evening nurse duty list (if applicable for assigned clinic)
   d. TMS Reference Guide
   e. Education Resource List – NFGS Intranet
   f. Calculation of Expiration Date of Medication
   g. Adult Immunization Schedule CDC 2016

III. SOC/CBOC Preceptor Lead Documents
    a. NF/SVGHS OPC/CBOC Primary Care Orientation Coversheet
    b. Weekly Clinical Orientation Tracking Tool
    c. Weekly Clinical Orientation tracking Tool – SAMPLE
    d. Outpatient Orientation Evaluation Letter
    e. Orientation Evaluation Questionnaire
    f. OPC/CBOC Ambulatory Care Nursing Service Competency (Complete within 90 days)
    g. OPC/CBOC Ambulatory Care Competency Verification Checklist (Complete within 90 days)
    h. OPC/CBOC Orientation Scavenger Hunt
    i. Link to CFRS Tab by Tab Timing
    j. Most Frequently Used Note Titles for Primary Care
    k. UPW: Universal Pharmaceutical Waste
    l. Nursing Competency Folder Content List

IV. SOC/CBOC Orientation Documents
    a. Outpatient Clinics Nursing Clinical Guidelines
    b. Specialty Follow-up Care Guidelines in the Outpatient Clinics
    c. Protocol for Patients in the OPC’s and CBOC’s that Present with Chest Pain
    d. Patient Hand-Off from Outpatient Clinics to Another Facility
    e. Roles and Responsibilities (RN Care Manager & Clinical Associate (HT, LPN))
    f. Guide for Orientation of New Employees- Environment of Care Orientation Checklist (Complete within 30 days of employment) ***Review with NM***
    g. Guide for Orientation of New Employees VA Form 4092 **Review with NM***
    h. SOC Nursing Service New Employee Orientation
    i. PYGIS: Med Station ID/Password/Bio ID Confidentiality Agreement
    j. VISN 8 Medication Test Answer Sheet
    k. Hypoglycemia Outpatient Flowchart
    l. Freestyle Glucose Meter Abbreviated Guide
V. SOC/CBOC Forms to review with your Nurse Manager
   a. Proof of Live Privacy Training (From HR, Day 1)
   b. HIPPA (From NEON, Day 2)
   c. Competencies (From NEON, Day 2)
      i. RME
      ii. AED/Code Cart/ Seek and Find
      iii. Glucometer Training- Point of Care
   d. Attestation Letter **may review with PACT Care Coordination (PCC) and sign**
   e. Peer Review Purpose and Process
   f. Peer Review Form

VI. *SOC/CBOC Required Competencies
   a. List of RN/LPN Required Competencies/Optional Competencies/TMS Required Trainings
   b. Required and Recommended Nursing Training Topics for FY—Neon Answer Sheet
   c. *Required Competencies and Supplemental Training Materials (See Library of Competency List)

VII. *SOC/CBOC Optional Competencies
   a. Additional Elements - CAU
   b. Primary Care Women’s Health Exam Skills Checklist

VIII. PACT - **Review with PCC and follow-up with preceptor**
   a. Daily Discharge Check Sheet
   b. 2-Day Post Discharge Calls for VA or Non-VA Discharges
   c. MyHealth/Vet
   d. Non VA Emergency Care Fact Sheet
   e. OR/IX
   f. PACT Fact Sheets
   g. Roadmap for Veterans
   h. Secure Message Surrogate Instructions
   i. Setting Preferences in SM MHV Program
   j. Teamlet Roster (If Available)
   k. Non-VA Care Coordination Note: Fact Sheet
   l. Where is that Data? (PowerPoint)
   m. Documenting Telephone Encounters/Telephone Encounters Coding
   n. Patient Aligned Care Team (PACT) – Pillars of PACT

* Supplemental Training Materials included
**Primary Care Orientation Coversheet (a.k.a. –The Grocery List)**

North Florida/South Georgia Veterans Health System
Satellite and Outpatient Clinics/Community Based Outpatient Clinics
Primary Care Orientation Coversheet - RN/LPN

<table>
<thead>
<tr>
<th>Orientation</th>
<th>Preceptor:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nurse Manager:</td>
<td></td>
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<tr>
<td>Clinical Nurse Educator:</td>
<td></td>
</tr>
<tr>
<td>EOD Date:</td>
<td>POD Date:</td>
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</tbody>
</table>

The coversheet outlines the orientation process for the RN/LPN, and is a supplement to the Orientation Competencies. It is not filed in the competency folder.

### WHEN COMPLETED

<table>
<thead>
<tr>
<th>ACTIVITY/PLAN</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>WEEK ONE</strong></td>
</tr>
<tr>
<td>Introductions to Primary Care, clinic staff, preceptor</td>
</tr>
<tr>
<td>Clinic Tour</td>
</tr>
<tr>
<td>Review of orientation paperwork (NEON, Competency Folder)</td>
</tr>
<tr>
<td>Complete and submit computer sign-on forms and submit to Nursing Informatics</td>
</tr>
<tr>
<td>Review Clinical Orientation Guide Book</td>
</tr>
<tr>
<td>NEON Workbook</td>
</tr>
<tr>
<td>Initiates Weekly Clinical Orientation Tracking Tool</td>
</tr>
<tr>
<td>Read and understands the Nursing Guidelines for assigned area</td>
</tr>
<tr>
<td>Introduction to Ambulatory Care Nursing/Primary Care (review PPT)</td>
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<tr>
<td>Assess orientation needs (Nursing Service Competency)</td>
</tr>
<tr>
<td>Start Scavenger Hunt</td>
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<tr>
<td>Take medication Test</td>
</tr>
<tr>
<td>Debriefing, evaluate needs, complete section on week 1 of Tracking Tool</td>
</tr>
<tr>
<td>Review Plan for week two</td>
</tr>
<tr>
<td><strong>WEEK TWO</strong></td>
</tr>
<tr>
<td>Continue Nursing Clinical Orientation</td>
</tr>
<tr>
<td>Start CPRS online tutorial <a href="http://www.vby.va.gov.cpr_online_training.cfm">http://www.vby.va.gov.cpr_online_training.cfm</a></td>
</tr>
<tr>
<td>Introduction to VA intranet to include the following 7 items</td>
</tr>
<tr>
<td>System Organizational Chart</td>
</tr>
<tr>
<td>Micromedex/Care Notes/Uppincott Nursing Procedures (under Clinical Tab)</td>
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<tr>
<td>Patient Education Handouts</td>
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<tr>
<td>My HealthTheVet</td>
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<tr>
<td>Nursing Policy</td>
</tr>
<tr>
<td>SharePoint</td>
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<tr>
<td>System Manuals (under Reference Tab)</td>
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<tr>
<td>Review PPT: Clinical reminder</td>
</tr>
<tr>
<td>Review PPT: Encounters Made Easy</td>
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<tr>
<td>Review PPT &quot;Verification of Orders in CPRS&quot;</td>
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<tr>
<td>Review telephone call process (handout)</td>
</tr>
<tr>
<td>Attend New Patient Orientation (NPO) class</td>
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<tr>
<td>Enter NPO data in CPRS</td>
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<tr>
<td>Patient Education, performance expectations, electronic and handwriting resources</td>
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<tr>
<td>Observe patient flow process</td>
</tr>
<tr>
<td>Observation with Preceptor in Primary Care (focus on Check-in/Clinical Reminder)</td>
</tr>
<tr>
<td>Clinical practice in PC with preceptor as resource person</td>
</tr>
<tr>
<td>Review and update competency check-list and individual competencies, ensuring completed skills are signed and dated</td>
</tr>
<tr>
<td>Debriefing, evaluate needs, complete section on week 2 of Tracking Tool</td>
</tr>
<tr>
<td>Review Plan for week three</td>
</tr>
</tbody>
</table>
Primary Care Orientation Coversheet (a.k.a. –The Grocery List)

<table>
<thead>
<tr>
<th>*** WEEK THREE</th>
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<tbody>
<tr>
<td>Continuation from Week Two: check-in/clinical reminders</td>
</tr>
<tr>
<td>Orient to Nurse Clinics (procedures, medications, injections, etc)</td>
</tr>
<tr>
<td>Meet with PACT Care Coordinator for PACT Orientation</td>
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<tr>
<td>Review PACT Protocol Policy and Appendix A - Protocol Orders</td>
</tr>
<tr>
<td>Orient to Patient Education Nurse Visits (Glucometer, BP monitor, Pre-Diabetes Education Assessment)</td>
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<tr>
<td>Start observation and training: Nursing exits, nursing appointments</td>
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<tr>
<td>Observe other areas within your clinic (CAU and Telehealth)</td>
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<tr>
<td>Set up “progress note preference list”</td>
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<tr>
<td>Practice check-in/clinical reminders</td>
</tr>
<tr>
<td>Review and update competency check-list and individual competencies, ensuring completed skills are signed and dated</td>
</tr>
<tr>
<td>Debriefing, evaluate needs, complete section on week 3 of Tracking Tool - Review and sign PACT Orientation Attestation Letter for TVOPC with Nurse Manager</td>
</tr>
<tr>
<td>Review Plan for week four</td>
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</table>

<table>
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<tr>
<th>*** WEEK FOUR - SIX</th>
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<tbody>
<tr>
<td>Continue Nursing Clinical Orientation, check-in/clinical reminders, exits (if applicable), nursing clinics</td>
</tr>
<tr>
<td>Continue observation and exposure to other areas within your clinic</td>
</tr>
<tr>
<td>Continue to work on competency check-list and individual competencies</td>
</tr>
<tr>
<td>Confirm completion of skills on Checklist, with signature and date</td>
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<tr>
<td>Debriefing, evaluate, complete weekly section on Tracking Tool for succeeding weeks</td>
</tr>
<tr>
<td>Review Plan for upcoming week</td>
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Revised 7/8/14
Nursing Service Competency

North Florida/South Georgia Veterans Health System
OUTPATIENT CLINICS / COMMUNITY BASED OUTPATIENT CLINICS / AMBULATORY CARE
NURSING SERVICE COMPETENCY (RN/LPN)
(Complete within 90 days)

Oriente: ___________________________ Clinic: ___________________________
Nurse Manager: ___________________ Preceptor: ___________________________
EOD Date: _________________________ Date Orientation Ended: _____________

INSTRUCTIONS:
• The employee will self-assess their ability level with each skill using the ranking scale.
• The preceptor(s) will date and initial the appropriate column as each critical element is completed. New employees should perform critical elements using current NF/SG VHS and Nursing Service policies and procedures.
• The preceptor(s) and orientee must sign the completed form, and return it to the Nurse Manager, for inclusion in the orientee’s competency folder.
• Any critical element not applicable to the assigned unit/clinic may be noted as NA for non-applicable.
• If any element is Not Observed during the 90 day period, N/A will be entered in this space. These skills will be reviewed and supervised prior to the employee performing independently. An additional Competency Checklist will be completed when the skill is complete. The Not Observed category is only to be used for infrequently performed skills that were not available during the orientation period.

**Rank:**
(1) N/A
(2) Needs Update/Review/Assistance
(3) No Help Needed

<table>
<thead>
<tr>
<th>Critical Element</th>
<th>Rank</th>
<th>Self-assessment</th>
<th>Performs &amp; Verbalizes Independently</th>
<th>Date</th>
<th>Preceptor’s Initials</th>
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</table>

A. NURSING PROCESS and DOCUMENTATION:

1. Knowledge of ‘Outpatient Clinics Nursing Clinical Guidelines’
2. Knowledge of ‘Specialty Follow-Up Care Guidelines in OPC’, if applicable
3. Knowledge of ‘Nursing Protocol Orders in Ambulatory Care and OPC’
4. Complete New Patient Orientation clinical reminders
5. Familiar with New Patient Orientation process
6. Assess, evaluate, and document patient care education and outcomes
7. Identify the Clinical Guideline(s) appropriate to the clinical setting
8. Completes CPRS template/ Checklists
9. Completes a consult via CPRS

5/11/2016
Weekly Clinical Orientation Tracking Tool

**Weekly Clinical Orientation Tracking Tool SAMPLE - RN/LPN**

**Orienteer:** ____________________________  **Primary Preceptor:** ____________________________

**Purpose:** A systematic unit-based orientation which is fostered by staff, facilitated by area experts and coordinated by a primary preceptor with the intention of nurturing a collaborative culture of nursing excellence.

<table>
<thead>
<tr>
<th>Unit Objectives</th>
<th>Orienteer’s Objectives</th>
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<tbody>
<tr>
<td>1. The orientee will become familiar with the resources within the organizational structure and nursing service.</td>
<td>A. Demonstrate ability to do the clinical reminder process for Primary Care patients.</td>
</tr>
<tr>
<td>2. The orientee will complete a self-assessment tool defining competencies and anticipated goals and objectives.</td>
<td>B. Demonstrate the ability to administer and document medications per the VA Ambulatory Care protocols for PC.</td>
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<td>3. The orientee will observe and participate in activities that are centered on the nursing process as introduced by the area experts.</td>
<td>C. To verbalize familiarity with assigned VA SOC or CBOC clinical operations.</td>
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<td>4. The orientee will utilize critical thinking skills and demonstrate the identification of priorities within culturally appropriate patient, and family interventions.</td>
<td>D. Demonstrate knowledge of healthcare resources available to veterans both within and outside the VHS.</td>
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<td>5. The orientee will identify performance improvement outcome indicators to measure effectiveness of nursing interventions related to patient safety.</td>
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<td>6. The orientee, area experts and preceptor will collaborate and generate strategies for effective completion of unit-based competencies that are contained within the domains of practice and document progress weekly on the check off lists and preceptor log.</td>
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<td>7. The orientee will integrate the professional training domains into clinical practice and become confident with identification of unit resources.</td>
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<td>8. The orientee will be able to identify legal and regulatory requirements within the VA health care system and describe their relationship to unit-based practice.</td>
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*Attach weekly area experts checklist summary to primary preceptor log*

**Goal:** Independent performance of Primary Care Nursing functions required of a Registered Nurse or Licensed Practical Nurse upon completion of a structured orientation program.
# Weekly Clinical Orientation Tracking Tool

**Weekly Clinical Orientation Tracking Tool - RN/LPN (page 2)**

<table>
<thead>
<tr>
<th>Date</th>
<th>Summary of Weekly Activities</th>
<th>Completed competencies within training domains</th>
<th>Orientation plans &amp; activities</th>
<th>Orientee/Preceptor’s Signature</th>
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<td>Orientee_________________</td>
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<td>Preceptor_________________</td>
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**Name:**

[Date of completion: May 2018]
Weekly Clinical Meetings

- Nurse Educator to meet with new staff weekly
  - Status on competency completion
  - Address any questions or concerns
  - Feedback on preceptor
  - Feedback from preceptor
  - Review of Weekly Clinical Orientation Tracking Tool
  - Written update to Nurse Manager to be provided
  - Plan for following week(s)
Evaluation: Feedback Cycle

Figure 1: Feedback Cycle of Staff Development
Go Forth and Orient...