Nursing Professional Development Services
Manager Orientation Checkpoint (MOC) Packet

Oriente Name: ____________________________                     Hire Date: ___/___/______

Orientation Timeline from Date of Hire:

<table>
<thead>
<tr>
<th>Month 1: _______</th>
<th>Month 4: ________</th>
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<tbody>
<tr>
<td>Month 2: _______</td>
<td>Month 5: ________</td>
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<tr>
<td>Month 3: _______</td>
<td>Month 6: ________</td>
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Purpose:
The MOC packet provides a guide to capture regular Manager/Assistant Nurse Manager oversight of Oriente’s clinical progress.

UTeam Onboarding & MOC:
- The MOC Tool is used in conjunction with the UTeam Onboarding Essentials program.
- The MOC focuses on the orientee’s clinical progress whereas the Onboarding Essentials program focuses on building a sustainable relationship with the Oriente.
- If it is time for an Onboarding meeting, combine the MOC meeting with the Onboarding meeting

Directions:
- Pre-schedule MOC meetings with Oriente (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 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 OCAE 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 orientee to achieve independent and interdependent practitioner roles.

Auditing:
- Thirty percent of all newly hired nurses orientation records are audited for compliance with the Preceptor and Orientation Standards Policies.
- 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

<table>
<thead>
<tr>
<th>Recommended Plan</th>
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<tbody>
<tr>
<td><strong>Assignment</strong></td>
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<tr>
<td>Blended preceptor/orienteer 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.</td>
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</table>

### Orientee:
- 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 OCAE form
- Completes Mandatory New Employee Training modules

### Preceptor:
- 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

### Manager/Assistant Nurse Manager
- 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:

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## Areas needing experience and/or development:

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## Action plan/Goals:

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## Signature:

<table>
<thead>
<tr>
<th>Orientee signature:</th>
<th>Date:</th>
<th>Preceptor signature:</th>
<th>Date:</th>
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<tbody>
<tr>
<td>_______________</td>
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<table>
<thead>
<tr>
<th>Manager signature:</th>
<th>Date:</th>
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</table>
Nursing Professional Development Services
Manager Orientation Checkpoint (MOC) Packet

Orientee Name: ____________  Month 2  Meeting Date: ____________

<table>
<thead>
<tr>
<th>Focus Area</th>
<th>Recommended Plan</th>
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</thead>
<tbody>
<tr>
<td>• Demonstrates increasing responsibility and competence in providing total patient care</td>
<td>Patient assignment - 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</td>
</tr>
</tbody>
</table>
| • Demonstrates ability to prioritize routine unit and patient care tasks | Orientee:  
  - 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 |
| • Demonstrates critical thinking skills | Preceptor:  
  - 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 signing off OCAE and New Hire Competency forms.  
  - Assesses for Reality Shock  
  - Utilizes evidence-based practice resources and policies are referenced to reinforce UVAHS nursing standards |
|                         | Manager/Assistant Nurse Manager:  
  - 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: ____________

Manager signature: __________________ Date: ____________

Preceptor signature: __________________ Date: ____________
### Focus Area

<table>
<thead>
<tr>
<th>Orientee Name: ___________</th>
<th>Month 3</th>
<th>Meeting Date: __________</th>
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<table>
<thead>
<tr>
<th><strong>Recommended Plan</strong></th>
<th><strong>Focus Area</strong></th>
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</thead>
</table>
| **Patient assignment**      | • 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  

- **Orientee:**
  - 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 OCAE/New Hire Competency form for completion of skills  
  - Monitors/evaluates/manages pain in assigned patients according to UVAHS pain guidelines  

- **Preceptor:**
  - 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 OCAE form.  
  - 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.  

- **Manager/Assistant Nurse Manager:**
  - Review Clinical ladder requirements  
  - Provides orientee with final orientation evaluation in collaboration with preceptor (if applicable)

### Strengths:

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### Areas needing experience and/or development:

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### Action plan:

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**Orientee signature:** __________

**Date:** __________

**Preceptor signature:** __________

**Date:** __________

**Manager signature:** __________

**Date:** __________
Nursing Professional Development Services
Manager Orientation Checkpoint (MOC) Packet

Orientee Name: ____________  Month 4  Meeting Date: _______

<table>
<thead>
<tr>
<th>Focus Area</th>
<th>Recommended plan</th>
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</thead>
<tbody>
<tr>
<td>• Identify duties that can be appropriately delegated to other members of the healthcare team</td>
<td>Orientee:</td>
</tr>
<tr>
<td>• Evolves efficiency of care provided becoming more fluid in providing simultaneous care tasks at once</td>
<td>• Manages a full patient assignment</td>
</tr>
<tr>
<td>• Recognizes unusual patient care situations or orders</td>
<td>• Collaborates with family/patient to identify expected outcomes</td>
</tr>
<tr>
<td></td>
<td>• Continue with previous bedside objectives and skill acquisition as patient assignment allows</td>
</tr>
<tr>
<td></td>
<td>• Identifies patient situations that are outside the normal and notifies shift manager or ANM</td>
</tr>
<tr>
<td></td>
<td>• Consults with other experienced clinicians to clarify patient care needs and achieve desired patient care outcomes</td>
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<td></td>
<td>• Reviews manager communications and has attended at least one staff meeting</td>
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<tr>
<td></td>
<td>• Develop mechanism for ongoing support (e.g. mentor, buddy)</td>
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<tr>
<td></td>
<td>• Reviews New Hire Form for completion of skills and obtains needed signatures</td>
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<tr>
<td></td>
<td>• Completes all unit assigned on-line modules</td>
</tr>
<tr>
<td></td>
<td>• Actively working on prior goals</td>
</tr>
<tr>
<td>Manager/Assistant Nurse Manager:</td>
<td>Manager/Assistant Nurse Manager:</td>
</tr>
<tr>
<td></td>
<td>• Reviews orientee’s progress with required clinical ladder documents</td>
</tr>
<tr>
<td></td>
<td>• Reviews progress on New Hire form and reviews established plan for completion of document</td>
</tr>
</tbody>
</table>

Strengths:

Areas needing experience and/or development:

Action plan/Goals:

Orientee signature: ___________________________  Date: ________________
Preceptor signature: ___________________________  Date: ________________
Manager signature: ___________________________  Date: ________________
Nursing Professional Development Services
Manager Orientation Checkpoint (MOC) Packet

Orientee Name: ____________  Month 5  Meeting Date: ________

<table>
<thead>
<tr>
<th>Focus Area</th>
<th>Recommended Plan</th>
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</thead>
<tbody>
<tr>
<td>• Demonstrate autonomy in providing patient care</td>
<td>• Orientee: Continues to provide patient care to full patient assignment but becoming more efficient in responding to patient care demands.</td>
</tr>
<tr>
<td>• Demonstrate effective delegation to other members of the healthcare team</td>
<td>• Engaging in a mentorship relationship</td>
</tr>
<tr>
<td></td>
<td>• Actively working on prior goals</td>
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<tr>
<td></td>
<td><strong>Manager/Assistant Nurse Manager:</strong></td>
</tr>
<tr>
<td></td>
<td>• Collects required clinical ladder documents, if applicable</td>
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<tr>
<td></td>
<td>• Reviews progress on New Hire form in preparation for first annual performance review.</td>
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<tr>
<td></td>
<td>• Establishes plan for orientee attending/completing any needed unit-based education (examples: core curriculums, ECCO, EPCCO, Progressive Care Core Curriculum)</td>
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<td></td>
<td>• Reviews 5 Year Career Pathway with employee</td>
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<td></td>
<td>• If employee is AD RN, Review BSN Academic Progression Milestone Tool</td>
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<td></td>
<td>• Set goals for continuing professional development (including obtaining BSN if needed)</td>
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**Strengths:**

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**Areas needing experience and/or development:**

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**Action plan/Goals:**

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Orientee signature: ___________________________  Date: ______________________

Preceptor signature: ___________________________  Date: ______________________

Manager signature: ___________________________  Date: ______________________
Nursing Professional Development Services
Manager Orientation Checkpoint (MOC) Packet

Orientee Name: ___________  Month 6  Meeting Date: ___________

<table>
<thead>
<tr>
<th>Focus Area</th>
<th>Recommended Plan</th>
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</thead>
</table>
| • Provides patient care efficiently through the use of appropriate delegation and providing simultaneous nursing care activities. | Orientee:  
• 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 |

Manager/Assistant Nurse Manager  
• Tracks orientee’s progress for attending/completing any needed unit-based education (examples: core curriculums, ECCO, EPCCO, Progressive Care Core Curriculum)  
• Establish goals entered into PA system |

Strengths:

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Areas needing experience and/or development:

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Action plan:

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Orientee signature: ____________________________  Date: ____________________________

Preceptor signature: ____________________________  Date: ____________________________

Manager signature: ____________________________  Date: ____________________________