

Quick Start Guide – Formal Evaluations

Three-step process:

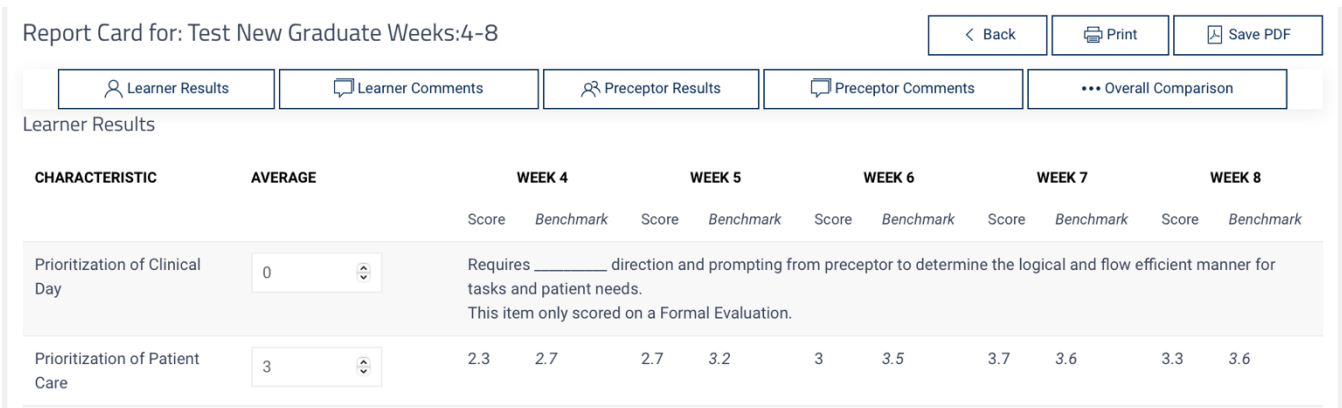
1. Report Card⁶
2. Formal Evaluation⁷
3. Questions Update⁸

Report Card

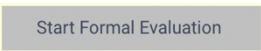
1. Log-in using your Orientation Nurse Username & Password
2. Navigate to a Learners' Site View click on: 
3. Choose the weeks to include in the report:



4. Each domain of the evaluation will be displayed with available benchmark data. Average scores⁹ for items that were submitted on Daily Evaluations are calculated. These values can be adjusted as needed by the orientation nurse to match actual performance.



CHARACTERISTIC	AVERAGE	WEEK 4		WEEK 5		WEEK 6		WEEK 7		WEEK 8	
		Score	Benchmark	Score	Benchmark	Score	Benchmark	Score	Benchmark	Score	Benchmark
Prioritization of Clinical Day	0	Requires _____ direction and prompting from preceptor to determine the logical and flow efficient manner for tasks and patient needs. This item only scored on a Formal Evaluation.									
Prioritization of Patient Care	3	2.3	2.7	2.7	3.2	3	3.5	3.7	3.6	3.3	3.6

5. Review scores, comments, and Learner Specific Questions received in selected period.
6. Click:  (data only carries over to the Formal Evaluation, it doesn't save to the database).

⁶ The Report Card is a tool to prepare data for a formal evaluation. It is not required. This is intended to allow the Orientation Nurse to review a number of evaluations on the same screen and understand a Learner's progress. It can be reviewed in advance of the Formal Evaluation and left open as long as the user remains logged in.

⁷ The Formal Evaluation is to be completed by the Orientation Nurse with the Learner and submitted to the affiliate educator and affiliate leadership.

⁸ The Question Update is to be completed by the Orientation Nurse after a formal evaluation. It can also be accessed directly from the Learner's Page. It can be completed after the Orientation Nurse has time to reflect on the best ways to help the Learner reach their goals.

⁹ Average scores are blank for items that are not scored daily. The orientation nurse can fill-in these values on the Report Card and they will carry over to the Formal Evaluation.

Formal Evaluation

1. Review scores for each domain with learner.

CHARACTERISTIC	DESCRIPTION	NOTES
Availability	I am <input type="text" value="99.9"/> aware of the location of my preceptor when I need to ask questions or get assistance with patient care.	<input type="text"/>
Approachability	I <input type="text" value="88.1"/> feel comfortable to ask a question or get assistance from my preceptor. Consider your preceptor's ability to listen, ease of talking to, ease dealing with concerns.	<input type="text"/>

Notes are visible on the Evaluation Site View to Orientation Nurses and Leadership users.

2. Set goals for domains as needed.¹⁰

CHARACTERISTIC	GOALS FOR THE NEXT 2 WEEKS:
Prioritization of Clinical Day	<input type="text"/>
Prioritization of Patient Care	<input type="text"/>

3. Click: (saves data to database and send confirmation to Orientation Nurse).

Learner Questions Update

1. Provide a progress report to Leadership users including the Next Steps and Anticipated dates the Learner will adjust to independent practice.
2. Learner Notes (public) pulls in goals set on previous screen. This is the text that will display to the Learner and Preceptors. In this text area also include any announcements or information the learner may need.
3. Enter up to 3 questions/answers¹¹ to place at the beginning of each Daily Evaluation. There are template buttons to the right of the fields to assist in question development.
4. Select Yes/No to send an automated message informing preceptors / learner that their goals have been updated.
5. Click: (save data & send message).

Question 1 For

Both to Answer

Question 1

Did you run the board with your preceptor regularly, discussing next steps for each patient, with your pi

Question 1: Options

Yes

No

Cardiac Rhythm	Plan of Care
Communication 1	Plan of Care 2
Delegation	Prioritization 1
Medications 1	Prioritization 2
Medications 2	Safety Net 1
Organization	Safety Net 2
Organization 2	Safety Net 3
Organization 3	Teamwork

Send Update Email?

Yes

Send Update Message to:

Zach Norman Colin Frisch

Test New Graduate Matt Helmerichs

Allison Helmerichs Ian Starkweather

Ashley Collingwood

¹⁰ Goals will carry over to each Preceptor Public Page automatically. They also carry over to the Learner Update page. Aim to set 2-3 goals on each formal evaluation. There is not limit, but a goal in each domain is not necessary.

¹¹ These questions should evaluate the learner's progress to achieving the goals they set. Utilize the template buttons to the right to assist with Question Development.