


# Quick Start Guide – Preceptor Assessment

Similar to a Formal Evaluation for a Learner, the Preceptor Assessment is designed to be a check-in with the Preceptor to celebrate success, identify opportunities, and set a plan of action going forward. These assessments can also be shared with Leadership Users.

1. Log-in using your Orientation Nurse Username & Password
2. Navigate to a Preceptor's page, click  on:
3. Choose the dates to include<sup>12</sup>:

Start Preceptor Assessment for: Zach Norman [← Back](#)

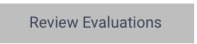
Produce a report of Daily Evaluation results between start/finish dates, it will display monthly averages & benchmarks. The Preceptor Assessment saves results of Daily Preceptor Evaluation Results, Preceptor Comments that have been highlighted by an Orientation Nurse, Sections for: Strengths, Opportunities, Challenges, and Finally an Action Plan. There is an opportunity to send a copy of this assessment to the Preceptor and Leadership at the conclusion of the Assessment form. This Assessment will be visible to the Preceptor and Leadership on the Individual preceptor's transcript.

**Start Date**  
2022-09-01

**End Date**  
2023-03-01

**Affiliate / Role**  
Springfield Memorial Emergency (RN)

[Create Assessment](#) | [Review Evaluations](#)

- a. Choose  for a table of the Learner and Preceptor's impression of their shifts. Add Preceptor Comments if there were notable achievements / concerns.

Review Evaluations:

EVENT	LEARNER'S IMPRESSION	PRECEPTOR'S IMPRESSION
<b>Thu, Sep 8th, 2022 06:45-19:15</b> NEDOCs:169 Learner:Baillie Smith Preceptor:Zach Norman We were assigned - --- The acuity level was - --- Our patients kept us - ---	Overall Learner: Level 4  Today I felt really good about doing things on my own. When things got busy, I needed a little more help. One big takeaway that I took from today was to be more comfortable being expressive to doctors. I think I should get more involved and ask questions more because this will not only help me learn from others, but they will see my critical thinking skills and trust me more. I also got more help from Zach when it comes to thinking about smaller details in the patients care.	Overall Preceptor: Level 3  Baillie did a nice job on a busy day. Towards the afternoon she got overwhelmed and started to revert to focus on tasks rather than goals. I didn't realize that she hadn't taken a lunch yet and once she took 30 min she came back, ran the board and really got re-organized.  Her hallway patient got hypoxic after running out of o2. The tank was quickly replaced. But the patient still experienced arrhythmia (~15-20 seconds of v-tach); Baillie needed assistance in problem solving to prevent future issues and to figure out the next two steps. She clearly connected the patho of why things went the way they did.... This curve ball de-railed her organization, she ended up not realizing that the patient had saturated her depends. The next shift realized that had been missed.  She is making progress... and doing more of the care organization and prioritization herself.
<b>Fri, Oct 7th, 2022 06:45-19:15</b> NEDOCs:88 Learner:Daniel Camp Preceptor:Zach Norman	Overall Learner: Level 5  Couple ICU patients, working on getting patients downgraded	Overall Preceptor: Level 4  Able to provide care and use the tools that we have provided to him. Discussed in his leader meeting today that the ball is in his

[Add Preceptor Comment](#)

Figure 4 - Review Evaluations on Preceptor Assessment

- b. Choose  to begin the Preceptor Assessment.

<sup>12</sup> By default, the assessment reviews the past 6 months of evaluations, the Best Practice is to complete a Preceptor Evaluation with each Primary Preceptor following a cohort of learners completing orientation.

- Data is pulled from Evaluations, Events, and Preceptor Comments for the selected time period. The evaluation data is automatically averaged but can be adjusted. Each area includes an opportunity for comment.

During this period, Zach in their role as a RN preceptor at Springfield Memorial Emergency had shifts with: Bailie Smith, Daniel Camp, Danielle Griner

🔍 Daily Preceptor Evaluation Results

CHARACTERISTIC	Average	NOTES
Availability	83.30	asdlkfjaskdf
Approachability	98.30	
Goals	96.70	
Timely Feedback Delivery	98.30	asdfasdf
Clear Feedback Delivery	98.30	
Communication with the Healthcare Team	98.30	
Assimilation to Department Culture	98.30	asdfasdf
Teaching Delivery	98.30	
Problem Solving	100.00	
Evaluation Completion Rate	100.00	

💬 Preceptor Comments

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**Complement from: Bailie Smith**

Thursday, September 8th, 2022 | Posted by: Zach Norman

*"Today I felt really good about doing things on my own. When things got busy, I needed a little more help. One big takeaway that I took from today was to be more comfortable being expressive to doctors. I think I should get more involved and ask questions more because this will not only help me learn from others, but they will see my critical thinking skills and trust me more. I also got more help from Zach when it comes to thinking about smaller details in the patients care."*

Bailie is being very insightful about her performance gaps. She recognizes where she has made progress and where she can improve.

Source: Daily Preceptor Evaluation re: shift: 9/8/2022 06:45. Evaluation ID: 1035

🔔 Preceptor Feedback

Figure 5 - Preceptor Assessment

- Choose users to share this assessment results.
- Click Update to save the result, send an e-mail, and post to the Preceptor's Transcript<sup>13</sup>.

<sup>13</sup> Preceptor Assessments can be created/edited by Orientation Nurses but are visible to the Preceptor and Leadership Users.