

## Mosby's Preceptor Course

### Preceptor Performance Evaluation Tool

(Tool for Preceptor Self-Assessment, and Orientee, Manager, Educator, or Other Evaluator)



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**Preceptor:**

**Evaluator:**

**Evaluator position:**  Preceptor  Orientee  Manager  Educator  Other \_\_\_\_\_

**Check one:**  Weekly Evaluation  Monthly Evaluation  Final Evaluation

Other (*describe*) \_\_\_\_\_

**Date:** \_\_\_\_\_

**Rating scale 1-5:** **Strongly disagree = 1; Strongly Agree = 5**      ★ Indicates performance after completing Advanced Level lesson

<b>Activity</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>Comments</b>
<b>Role of Preceptor</b>						
Provides a supportive orientation environment that meets the preceptee's individual learning needs and development goals						
Uses available resources to enhance the orientation experience						
Promotes patient safety through appropriate assignments, observation of performance and consistent feedback						
Provides safe learning environment and positive reinforcement for the preceptee						
Uses research and theory-based principles to teach and evaluate performance of the preceptee						
Facilitates development of preceptee by fulfilling the roles of socializer, team leader, and role model						
Guides the novice preceptee through the stages of reality shock						
<b>Teaching/Learning Process</b>						
Identifies the preceptor's and the preceptee's preferred learning styles						
Acknowledges differences in learning styles as evidenced by incorporating the learner's						

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preferred style into the orientation and coaching plan						
Provides a learner-centered orientation based on the concepts of Knowles framework						
Plans and implements the orientation based on the concepts of Benner's Novice to Expert framework						
Uses a variety of teaching strategies that respond to individual learning needs and the development of competency Advanced Level						
Has developed self-awareness about personal biases★						
Demonstrates respect for cultural differences★						
Incorporates culturally sensitive approaches in the orientation plan★						
<b>Competency</b>						
Collects evidence of competence utilizing a variety of assessment tools						
Overcomes barriers to the assessment process						
Evaluates competency in all three domains, including cognitive, psychomotor and affective						
Sets expectations that are realistic for the novice or advanced beginner						
Uses sources of shared performance expectations to determine clinical competency★						
Utilizes the stages of clinical competence when evaluating competency★						
Distinguishes behaviors in novice performance that are amenable to remediation★						
Develops a plan of action for success for the learner who is not competent★						
Documents the competency						

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assessment process including remediation and further action plans★						
<b>Communication</b>						
Uses effective verbal and non-verbal communication skills with the preceptee, including:						
1. Listening attentively						
2. Verifying understanding						
3. Providing constructive feedback						
4. Applying conflict resolution strategies						
Communicates respect for personal and cultural differences						
Recognizes communication challenges and provides an opportunity for issue-based dialogue★						
Creates a supportive environment that enhances learning through open, two-way communication between preceptor and preceptee★						
<b>Critical Thinking</b>						
Establishes a relationship with preceptee such that questioning and reflection are a vital part of preceptor practice and preceptee development						
Explains to the preceptee the link between critical thinking and effectiveness of nursing care						
Uses the nursing process to develop and evaluate critical thinking						
Uses non-threatening questions to promote the novice's critical thinking development using words such as analysis, reason, judgment						
Shares rationales with the novice related to how you make decisions in the moment; i.e. what you consider when setting or changing priorities						

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Uses opportunities like patient rounding to explain patient progress or setback and identify what contributed to it						
Reviews with the novice how to analyze and interpret data						
Seeks and shares learning resources related to clinical setting and specialty						
Reflects on practice by evaluating patient outcomes and patient progress★						
Relates patient outcomes to care activities, standards of care and evidence-based or best practices★						
Demonstrates inquisitiveness; is eager to know the patient and the most effective way to meet their needs by seeking knowledge and understanding through observation and thoughtful questioning in order to explore alternative possibilities★						
Shows sensitivity to divergent views★						
Identifies bias in self and others★						
<b>Precepting in Action</b>						
Implements the orientation plan as collaboratively developed						
Makes adjustments to the orientation plan based upon preceptee performance						
Documents specific evidence of preceptee achievement of expectations and competencies						
Completes documentation of evidence in a timely manner						
Communicates effectively and regularly with preceptee, manager, and educator concerning progress and orientation plan						
Collects relevant assessment data related to preceptee knowledge and experience★						
Develops realistic and mutually agreed upon goals and						

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expectations within orientation planning *						
Develops goals that are specific, measurable, achievable, and time-oriented *						
Develops goals for skill development and professional role development that align with facility goals *						
Uses anticipatory reflection to modify goals according to the preceptee's performance and the patient population *						
<b>Supporting the Preceptee</b>						
Establishes a trusting and respectful relationship with the preceptee						
Promotes a supportive, collaborative learning environment for the novice						
Introduces novice to resources in the clinical setting						
Plans patient assignments based on the preceptee's learning needs and current orientation plan *						
Plans patient assignments based on current teaching-learning theory; i.e. simple to complex, plans for success, values what the learner brings, etc. *						
Facilitates preceptee development of effective time management and work organization *						

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