

PROTOCOL FOR: Competency Checklist, Orientation and Annual: Completion of for Permanent Nursing Staff, Contract Nursing Staff and Nurse PROs

- POLICY:**
1. The competency of Department of Nursing employees will be validated during orientation (General Nursing Orientation, Medical-Surgical Nursing Orientation, Unit-based orientation) and annually. Annual unit based competency tools are created each review year based on summative data from annual performance reviews, identified needs and regulatory standards. Once distributed the unit annual checklists are not revised. Any additionally identified competencies are captured on Report of Educational Offering sheets and transcribed onto the employee's Educational Activities Record which is attached to the annual performance review.
 2. Permanent Department of Nursing staff will complete the Unit-Based Orientation Competency Checklist by the end of their unit orientation and/or working test period.
 3. Contract Staff Orientation usually includes 24 hours of general orientation and 24 hours of unit based orientation. The Staff and Patient Education and Development Specialist will insure that contract nursing staff completes the self assessment component of their assigned unit(s) based orientation competency checklist prior to arrival on the unit. This self assessment will be completed once a contract is signed or at latest during the general nursing orientation of the contract nurse.

**ACTION/DECISION-
MAKING PROCESS:**

1. Obtaining Checklists

- a. Staff will receive the appropriate General Nursing Orientation (GNO) Checklist as follows:
 - 1) Permanent staff and Nurse PROs will receive the GNO Checklist (JDH Nursing Orientation Activity Checklist) during orientation for completion by the Department of Staff and Patient Education.
 - 2) Contract nursing staff will complete Health Center/Hospital Orientation through a self-learning and interactive format by scheduling through Staff and Patient Education. They must present a current BCLS certification card and complete Code Blue, Safety, and other required mandatory training.
- b. Staff will receive their Unit-Based Orientation Competency Checklists as follows:
 - 1) Permanent staff will obtain the unit-based orientation competency checklist from the Clinical Nurse Specialist, preceptor, Assistant Nurse Manager, or Nurse Manager on, or before the first day of unit-based orientation.
 - 2) The unit manager or designee will oversee that each contract nurse's unit based orientation competency checklist(s) is individualized to the performance expectations of the unit based on the individual self assessment and agency provided competency checklist.

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c. Unit-Based Annual Competency Checklists are distributed on a unit-specific basis and cover the review year of 5/1/XX-4/30/XX.

- 1) Contract clinical nursing staff does not complete an Annual Competency Checklist unless they have been contacted for more than 11 months to one year.
- 2) Non-clinical staff does not complete an Annual Competency Checklist.

2. Checklist Completion

a. The JDH Nursing Orientation Activity Checklist (General Nursing Orientation) will be completed to identify topics and class dates attended by the orientee.

b. The Unit-Based Orientation Competency Checklist will be completed as follows:

- 1) Prior to beginning unit-based orientation, the orientee will complete a self-assessment by checking the appropriate box under the self-assessment column indicating their level of expertise/experience ("never done", "needs review/practice", or "competent") for each topic listed on the checklist.
- 2) The preceptor and the orientee will review the orientee's perceived level of expertise as a basis for identification of learning needs. This will be used in planning the unit-based orientation.
- 3) The preceptor will date and initial the individual topics/skills when competency in that topic/skill has been demonstrated according to an identified standard. The preceptor identifies the method by which validation of the competency was achieved, using the code described on the competency checklist.

c. The Unit-Based Annual Competency Checklist will be completed as follows:

- 1) Validation of clinical competence is determined at the unit level by the CNS or designated clinical expert nurse on the unit.
- 2) These identified clinical expert(s) then validate(s) competence in other staff members by observation in clinical practice, return demonstration/simulation, verbal or written test.
- 3) The completed checklist is submitted to the Nursing Manager as part of the employee's annual evaluation by 3/31 of each year.

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- d. The Annual John Dempsey Hospital Competency Checklist (Mandatory Education) will be completed each year by assigned staff. This will serve as the annual competency for the NCA (Nursing Care Assistant) and MA (Medical Assistant) roles unless additional annual competencies are identified by individual units.

3. Filing of Completed Checklists

- a. For permanent staff, orientation and annual competency checklists will be sent to Human Resources for filing in each employee's file. Managers will keep a copy of the checklists in their files.
- b. For contract nursing staff, central orientation checklists (Clinical Operations Orientation, General Nursing Orientation and Medical-Surgical Nursing Orientation), unit-based orientation competency checklists and applicable annual unit based competency check lists will be sent by the Unit Manager to the Manager of Staffing/Payroll for filing in each employee's personnel file if applicable.

REFERENCES: Nursing Administrative Council

EFFECTIVE DATE: 12/90

REVISION DATES: 1/92, 12/97, 10/00, 10/03, 10/07, 7/09, 11/09