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Utilizing a QSEN Based Clinical Orientation Checklist as a Standard for Orientation

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ABSTRACT

The goal of this project was to provide clinical adjunct faculty members with tools to be successful in their role. This article will focus on a tool developed by the QSEN Academic Clinical Taskforce to assist faculty with standardizing the orientation for students to the clinical setting. This orientation checklist is essential to assist clinical faculty when orienting their students in all guided clinical rotations. The checklist is organized by defined QSEN competencies with adapted definitions for clinical nursing students. The checklist provides a guide for faculty members when orienting their student group to the clinical environment. Utilizing a standardized clinical orientation tool allows for continuity and creates a safer learning environment for nursing students.

Keywords
Clinical, Orientation, Checklist, QSEN

Introduction

The first clinical day for faculty is exciting and can be overwhelming even for the most seasoned clinical nursing instructor. Clinical faculty must share much information with the nursing students before they begin caring for patients on any unit. Therefore, clinical faculty can benefit from an orientation guide or checklist. An orientation checklist is essential for all clinical instructors when familiarizing their students in guided-clinical rotations. To meet this need, the Academic Clinical Taskforce Committee, one of the Quality and Safety Education for Nurses (QSEN) taskforce committees, collaborated on this initiative. The taskforce built the checklist based on each of the six QSEN competencies: Patient-Centered Care, Teamwork and Collaboration, Evidence Based Practice, Quality Improvement, Safety, and Informatics [1]. The objectives, knowledge, skills and attitudes of each competency were reviewed and then adapted specifically with learning outcomes for the clinical nursing student. Each QSEN competency is represented on the orientation checklist (Appendix A) with ongoing suggested student learning activities (Appendix B). The checklist is used to guide the clinical faculty member

in orienting their student group to the clinical environment. The suggested student learning activities embeds the knowledge, skills, and attitudes of the QSEN competencies and will assist faculty with strategies for students to apply them. The ultimate goal of the taskforce was to create one standardized orientation tool to build the foundation for a safer learning environment for nursing students.

Background and Significance

An extensive review of the literature sought to find examples of clinical orientation checklists or guides for faculty to use on their first day of orientation. A guide is especially important for novice faculty since many do not know what should be included when orienting clinical students on their first day [2-5]. Examples of orientation ideas can be found in books for purchase, however, none can be found in journal literature.

A review of the journal literature found many authors recommend orientation and mentoring for clinical nursing faculty. Culleiton and Shellenbargaer [9], recommend providing tools, checklists, and information to clinical nursing instructors to provide structure and consistency to clinical rotations. To make a successful transition from bedside nurse to clinical educator these resources

are essential. However, these tools cannot be found.

The National League of Nursing does provide a list of core competencies and task statements [30]. This comprehensive list is specific for academic faculty in both clinical and non-clinical roles. This checklist helps faculty to develop relationships with students, faculty, and clinical agencies [10]. However, it does not provide examples for clinical faculty to orient their nursing students on the first clinical day.

Needs of Adjunct Faculty

A popular strategy in academia to augment the full-time nursing faculty and to accommodate increased student enrollment, is to hire registered nurse clinical experts to teach the clinical component of a nursing course [6,8]. Having practicing nurses as clinical faculty is crucial since about half of a nursing students' time is spent in a clinical practice setting [11]. When registered nurses make the transition from a bedside clinical nurse to clinical faculty, the literature recommends novice clinical faculty be given an orientation and support in their new role [12-14]. However, many newly hired adjunct faculty must transition into the role with little notice, only a brief orientation, and lack the necessary teaching skills and strategies [8,12].

A clinical faculty orientation provides faculty with tools to be successful in their transition from bedside nurse to academic faculty. Unfortunately, most novice adjunct clinical educators are not given tools to effectively teach or orient their students to the clinical setting [2-5]. For this reason, the focus of this article is to publish a QSEN based clinical student orientation checklist, which includes application strategies for clinical faculty to use during the first clinical day. This checklist will provide a standardized orientation guide to assist all clinical instructors.

Strategy and Development

All clinical instructors must orient students to the clinical setting. Nursing students must be provided a quality clinical orientation. Many clinical instructors will create their own orientation checklist or obtain one from a colleague. However, a non-standardized mere list of items does not provide a depth of learning for students.

The goal of this project was to provide pre-licensure clinical faculty with a standardized orientation checklist that can be used for the first clinical day of a rotation. This newly created unique checklist embeds all of the QSEN competencies and includes a scavenger hunt for students to locate essential items on their clinical unit (Appendix A). Additionally, the checklist includes QSEN application-based activities and knowledge, skills, and attitude scenarios which, can be used throughout the semester to enhance the clinical experience (Appendix B).

When utilizing this checklist as a guide, faculty are able to give clear objectives for the clinical orientation while highlighting the six QSEN competencies. The six QSEN competencies included in the checklist are: safety, quality improvement, evidence based practice, teamwork & collaboration, communication and

informatics. Furthermore, the checklist defines the knowledge, skills, and attitudes for nursing students to learn and implement the QSEN competencies. The ultimate goal in using this standardized orientation checklist on the first clinical day is to ensure quality and safety from the beginning of each clinical rotation.

Learning objectives for this project

When faculty use the orientation checklist it will allow them to meet the following objectives:
- Identify how to incorporate each QSEN competency into the clinical orientation using the competencies, scenarios, and additional problem solving strategies.
- Demonstrate a comprehensive understanding of the QSEN competencies and how to orient and teach students based on the QSEN competencies.
- Understand a variety of teaching methods and strategies that can be incorporated into the orientation and the pre-and post-clinical conference discussions.

Implementation

Clinical faculty were first oriented to the checklist to be utilized for faculty guided clinical rotations, which included fundamentals, medical-surgical, pediatric, maternity and mental health rotations. Faculty were asked to review the QSEN competency clinical orientation checklist with their student groups during the first day of the clinical rotation. Following the introduction, the students were asked to discuss the six QSEN competencies in relationship to the clinical (site/agency/partner). This activity allowed the students to incorporate the QSEN competencies into the clinical setting from the beginning of the clinical rotation.

Faculty reported anecdotally after using the standardized orientation checklist during the first clinical day that the checklist helped build a solid foundation for the clinical rotation. Additionally, the faculty found that using the checklist provided structure to the orientation and the scavenger hunt allowed students to locate needed items on the unit to prepare for their clinical rotation. This activity increased confidence and awareness of items on the unit, resulting in improved use of the QSEN competencies, a safer clinical environment, and increased communication regarding clinical expectations. Feedback from both the clinical faculty and the students was positive. Faculty reported greater understanding of the areas needed to review during the clinical orientation day. This generated a great discussion for the orientation, as well as clinical pre-and post-conferences throughout the semester. Lastly, the feedback from the clinical agency indicated satisfaction that safety goals for the hospital were incorporated into the orientation.

Using the checklist for the first time in the semester was a success. However, the faculty felt that the additional learning activities were so comprehensive that they were unable to complete all the elements. Therefore, faculty suggested that these activities be incorporated in clinical conferences. Future recommendations include using the checklist on the orientation day as a guide and the remainder of the QSEN based activities should be embedded into the clinical pre-or post-conferences throughout the entire

semester. Highlighting each competency during the clinical weeks is a more manageable use of these resources. This feedback will be used in the future when orienting the clinical faculty to the clinical orientation QSEN checklist.

Implication for Nursing Practice

The orientation checklist (Appendix A) resource is available from the Academic Clinical Practice Taskforce website for both the academic and clinical partners to be incorporated as part of a standardized clinical orientation. It is also available on the QSEN website as a teaching strategy. This orientation checklist can be utilized with pre-licensure nursing students in all types of clinical rotations including specialty rotations. When the checklist is utilized faculty will have clear objectives for the clinical orientation highlighting the six QSEN competencies.

Conclusion

Having nursing faculty, with current clinical practice experience is crucial, since nursing is a practice profession with about half of a nursing students' time spent in hands-on learning in a practice setting [11]. Therefore, a popular strategy is to hire registered nurse clinical experts as adjunct clinical instructors [6,8]. However, in their new faculty role these nurses are novice clinical educators [11]. All too often these newly hired adjunct faculty must transition into the role with little notice, in addition to lacking the necessary teaching skills and strategies [8,15].

Many recommendations can be found in the literature for formal orientation and mentoring as strategies for successful transition to the role of nurse educator [6]. Unfortunately, most novice adjunct clinical educators are not given tools to effectively teach or orient their students to the clinical setting [2-5]. Additionally, orientation tools for clinical faculty use cannot be found in the literature [16,7]. For this reason, the focus of this article was to publish a QSEN based clinical orientation checklist including application strategies for all clinical faculty to use during the first clinical day. Having a standardized clinical orientation checklist is one tool clinical faculty can use to provide an orientation that embeds the QSEN mission of increasing quality and safety when providing nursing care. Now, novice adjunct clinical faculty have a guide to help them prepare the clinical students on their first day. Ultimately, this resource helps to empower clinical faculty by giving them a solid resource for orienting nursing students in the clinical setting [17-19].

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Appendix A

Introductions	Daily routine
Student Contact Information	Report
Attendance policy / Tardiness policy Make-up Policy	Patient Care: Vital signs
Contact number students should use if late or absent.	Assessment / Plan of Care
Procedure for clinical day cancellation /Inclement weather	Medication Administration Schedule / Medication supervision schedule
Professionalism and expected behavior	Assigned Treatments
Dress code	Break times /lunch/dinner time
HIPAA and Social Media	When to communicate to instructor and patient's assigned nurse
Pre-clinical assignment	Shift Documentation requirement(s)
Patient preparation times / Time to meet for clinical experience	Report
Place to meet for clinical / Where to put student belongings Where students may sit on the unit.	Off Unit assignment(s) and Documentation Requirement(s)
Where to find student assignment schedule / How to find out the Nurse assigned to Patient	Post-conference
Introduction to Assigned Nurse	Tour of Unit
How to Receive Patient report Report sheet and Information to collect Patient Report	Expectations for clinical objectives
Gaining access to the computer system	Clinical Paperwork
Navigating Patient Health Record: What information to look up prior to patient care.	Explanation of reflective thinking
Medication cards/information Common medications on Unit	Weekly / every other week clinical evaluations/ Formative Evaluation and form
Resources Available on unit / cell phone use	Summative Evaluation
Policies specific to the institution Patient safety: fall precautions, Transmission-based precaution	Disciplinary Process

Table 1: QSEN Clinical Orientation Checklist & Scavenger Hunt.

CLINICAL ORIENTATION SCAVENGER HUNT

Medical Record
Admission
History and Physical
Doctors'/Provider' Orders
Nursing Notes (Interdisciplinary Health Team)
Daily Notes
Trends: Vital Signs, Laboratory Data, Weight, I & O
Non-Medication orders: Code status, activity, diet
Consults ordered
Plan of Care Plan
Nursing Station
Where can you find nurse, patient care assistant (PCA), medical or surgical team
Labs: How labs are ordered, collected, and sent.
New Doctors/Provider Orders- how do you know a new order is written?
ID Bands- What types are used? How are they placed on the patient? How are they replaced?
Medication Room
Syringes
New IV tubing

IV tubing dates	
IV supplies & IV solutions	
Medications	
Med-Books, IV Books	
Alcohol Swabs	
All Needles	
Glucometer	
Supply Closet	
All supplies	
Wound care: Biohazard bag, Tape, Sterile Gloves	
Dressing kits: Central Line Care Kits (for picc lines)	
Suture removal/staple removal kits	
Masks	
Respiratory Supplies: Nasal Cannula, Oximeter	
Restraints	
Specimen Cups	
Linens	
Linens & Blankets	
All bath supplies	
Dirty Utility Room	
What is in there?	
What do I put in this room?	
Bathrooms	
How many on the unit?	
Where are they located?	

Appendix B

QSEN Competency: Safety	Scenario (KSAs)	Goals	Problem Solving
Course Type: Guided Clinical or Faculty Lead Course Clinical Situation: "Medication Administration" Faculty member is on a clinical unit with a group of students. Faculty member must review hospital policy and procedure for students giving medications during a guided clinical experience.	The clinical faculty member is preparing the clinical assignments for five nursing students. The faculty must: • Attain a group of patients for the students to care for. • Determine which patient assignment is appropriate to deliver medications. • Determine which route of medications the students will administer (must know skills to be taught & level of student knowledge). • Communicate with the charge nurse and the nurses on the patient care assignment.	Faculty must create a clinical assignment for students. The assignment(s) must include: • The name of the student, the patient(s) the student will be assuming care for, time on and off clinical unit, the clinical goals and objectives, students giving medications, what medication times are being given, route of medications, and the nurse assigned to the patients. • Faculty must determine the appropriate person to communicate with when making clinical assignment. • Faculty must include the names of students giving medications, why these students were chosen, and what the medication administration goals include.	• Students who are caring for more than one patient. • Students giving medications in a skilled nursing faculty (SNF) or to a group of patients. • Students who are not prepared to administer medication. • Students who have the knowledge to give medications however, lack the skill.

QSEN Competency: Quality Improvement	Scenario (KSAs)	Goals	Problem Solving
Course Type: Guided Clinical or Faculty Lead Course Clinical Situation: "Clinical Preparedness" The faculty is assigned to a unit that offers specific skills and competencies, which students must know prior to beginning on the unit. The faculty member reviews skills with students during the clinical orientation that are common to this unit. Faculty assigns the students to review skills in the fundamental textbook and video collection per nursing program prior to the first day of clinical experience.	Student is going to perform a skill (i.e. sterile dressing change, Foley catheter insertion, central line dressing change, etc.) with faculty assistance. The student is very nervous because this is the first time they have performed the skill outside the skills lab. The faculty reassures the student that they will be with them throughout the entire procedure. The student and faculty member review the skill and gather needed equipment. They then discuss the skill with both the patient and the nurse caring for the patient prior to performing the skill. The student and faculty enter the patient's room and together perform the skill.	• Student will be successful in completing the skill. • Student will perform the patient assessment prior to performing the skill to include a plan for pain management and patient positioning. • Student will plan and gather correct equipment for the skill and procedure. • Student will discuss the patient procedure/skill order with both the patient's nurse and faculty member. • After the skill has been completed the student will follow-up with the appropriate documentation.	• Student begins skill and breaks sterile technique. • Student begins skill and becomes sick and thinks they will vomit. • Student is in the middle of the procedure and the patient starts screaming at the student to stop. • Discuss appropriate documentation with the student. • Student is not ready or prepared to complete this skill. What do you do?
QSEN Competency: Teamwork & Collaboration	**Scenario (KSAs)**	**Goals**	**Problem Solving**
Course Type: Guided Clinical or Faculty Lead Course Clinical Situation: "Safety with Technology" Faculty member is orienting their clinical group to the hospital computer system and bar code administration process.	The faculty member is preparing the clinical group to utilize the computerized system in the hospital. As a part of orientation, the faculty will discuss the student role in the use of technology and accessing information from the computer, the medical record system, and computerized order entry system. The students are taken to the computer training lab and given step-by-step instructions on how to gain access through their own log in, how to obtain patient information, and check medication records in the computer system. As part of the Information Technology training the faculty will discuss Health Insurance Portability and Accountability Act (HIPAA) and the privacy protocol for the hospital.	• Provide students with log-on instructions, identification, and password access through the health system. • Access the computer system and patient electronic medical record. • Access medications (current and home) from the computer order entry system. • Discuss HIPPA and privacy with the students during this orientation. • Demonstrate how to navigate the clinical chart. • Determine the patient care data students must enter into the patient record (Vital Signs, Intake and Output, Assessment, etc.).	• Students work together in teams to complete a scavenger hunt of items within the patient medication record. • Students learn what items to located in the patient medical record. • The student is administering medications using the bar code administration system. • Discuss with the student how to utilize the rights of medication administration using this process. • Discus with the students when a medication/scan label is missing or damaged. • Discuss with students when a patient does not have a name band.

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QSEN Competency: Teamwork & Collaboration	Scenario (KSAs)	Goals	Problem Solving
Course Type: Guided Clinical or Faculty Lead Course Clinical Situation: "Teamwork and Collaboration" Faculty member is discussing the role of nurses, PCAs, NPs, residents, PAs, Attending's, Ancillary Staff, Physical Therapist, Occupational Therapist, Dietician, Respiratory Therapist, Pharmacist, Specialists, and Care Coordinator.	The faculty member is in post conference discussing the roles of the patient care team. Each student is assigned a role. The students discuss each patient on the assignment and how the roles are incorporated into the care of the patient. The faculty member asks each of the students while in their assigned role to discuss way to enhance collaboration while caring for the patient.	• Define the roles on the clinical unit. • Discuss how each role is important to caring for the patient. • Role Play: Have each student assigned to a role and talk to the others in their identified role. The goal is to learn to communicate with each other and collaborate to implement a plan of care.	• What do you do when the roles are in conflict? • Discuss how collaboration amongst the roles can be effective and ineffective. • What causes conflict and can it be helpful? • What are the road blocks to effective communication and collaboration? • What do you do when the team does not agree?
QSEN Competency: Evidence Based Practice	**Scenario (KSAs)**	**Goals**	**Problem Solving**
Course Type: Clinical Guided or Faculty Lead Course Clinical Situation: "Evidence Based Practice" Faculty will require students to identify and research a clinical practice guideline such as: (wound care). Using the practice guideline; students will compare the research found in their textbooks and current journal literature to the hospital policy and procedure.	All students in the clinical group will work to identifying one more clinical practice guideline. The students will then research and compare a variety of resources regarding the practice. Lastly, students will discuss whether the hospital/agency policy and procedure is Evidence Based Practice (EBP) or needs to be updated.	• Discuss with students current EBP and what that means to nursing. • Identify resources to support EBP in the healthcare setting.	• Discuss the role of the student and the RN and how they can be a champion on their unit for change. • Discuss the process and methods for change within practice and hospital/agency policy procedures.
QSEN Competency: Patient Centered Care	**Scenario (KSAs)**	**Goals**	**Problem Solving**
Course Type: Guided Clinical or Faculty Lead Course Clinical Situation: "Patient Centered Care" Faculty member will give report to all students in pre-conference. The focus will be patient-centered care.	During pre-conference the faculty member will give basic information to the nursing students about the patient(s) they will be caring for on the clinical unit. The students will be working with their assigned patient throughout the day. During pre-conference: The student will report: their proposed plan of care for patient centered care. Examples: • Diet • Bathing preferences • Code Status • Family	• Students will identify how to make their plan of care patient-centered. • Students will discuss the patient's plan of care with the collaborative team.	• Students will identify gaps in their patient's plan of care and where they could be more patient focused. • Discuss with students about how the nurse can advocate for their patient. • Discuss legal and ethical concerns involved in patient centered care.

Table 2: QSEN Clinical Activities. **Note:** QSEN = Quality and Safety Education for Nurses.