Preceptor orientation checklist

Informed by the AACN 2026 Essentials, entry-level professional nursing education

Check means **reviewed**, not competent. Adapt to the planned assignment. Domain connections are a focused teaching guide, not a full sub-competency crosswalk. Use approved criteria to assess performance.

Before orientation begins

- ☐ Agree on the planned assignment, patient population, expected acuity, and unit-specific requirements with the educator and new nurse.
- ☐ Review approved competency criteria, scope, supervision, emergency procedures, and who to contact for help.
- ☐ Identify prior experience and learning needs. Explain how observations, feedback, and reassessment will be used.
- ☐ Set shift goals and planned review points. Arrange qualified assessors and opportunities to demonstrate required behaviors.

1. Knowledge for Nursing Practice

- ☐ Ask the nurse to connect assessment findings and trends with the patient's situation and priority concerns.
- ☐ Observe whether the nurse explains a care decision, acts within scope, and checks the patient's response.

Assess: Direct observation plus a brief reasoning discussion: What are you concerned about, why, and what would change your plan?

General learning goal / support / next review:

2. Person-Centered Care

- ☐ Observe assessment, prioritization, care, and reassessment with the patient's preferences and goals included.
- ☐ Observe teaching and teach-back, appropriate language assistance, and timely escalation of concerning changes.

Assess: Follow a care episode from assessment to reassessment. Review the nurse's teaching and response to a change in condition.

General learning goal / support / next review:

3. Population Health

- ☐ Ask how living conditions, access, support, and other health barriers affect the care or transition plan.
- ☐ Observe appropriate referrals and use of community or team resources for identified needs.

Assess: Review a discharge or transition plan and discuss unresolved access or follow-up barriers.

General learning goal / support / next review:

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Observe, discuss, and coach

Choose relevant goals before the shift. Observe care and reasoning, provide specific feedback, then identify the next opportunity to practice. Address immediate safety concerns promptly.

4. Scholarship for the Nursing Discipline

- ☐ Have the nurse locate an approved guideline or reliable evidence for a care question.
- ☐ Ask the nurse to explain how the guidance applies and when further consultation is needed.

Assess: Use one real practice question. Review the source, its relevance, and the resulting care discussion.

General learning goal / support / next review:

5. Quality and Safety

- ☐ Directly observe required medication, identification, infection-prevention, procedure, and equipment safeguards relevant to the assignment.
- ☐ Review how the nurse stops or questions unsafe care and reports errors, near misses, or hazards through approved channels.

Assess: Use unit-approved observation criteria. Discuss a discrepancy or interruption; do not substitute a quiz for required skills validation.

General learning goal / support / next review:

6. Interprofessional Partnerships

- ☐ Observe clear handoff and escalation, including urgent concerns, pending tasks, and confirmation of understanding.
- ☐ Look for respectful collaboration, clarification of responsibilities, and timely requests for team support.

Assess: Observe handoff and a team interaction. Ask who owns follow-up and how the nurse confirms it occurs.

General learning goal / support / next review:

7. Systems-Based Practice

- ☐ Observe prioritization and adjustment of the expected assignment when patient or workload needs change.
- ☐ Review use of unit resources and how workload, delays, or system barriers are escalated.

Assess: Review a representative shift and the reasons for changes in the care plan. Validate delegation and oversight under local requirements.

General learning goal / support / next review:

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Review progress and support

8. Informatics and Healthcare Technologies

- ☐ Compare documentation with observed care for accuracy, timeliness, and required follow-up.
- ☐ Observe safe use of assigned clinical systems and equipment, privacy safeguards, and verification of questionable information.

Assess: Combine chart review with observed use. Discuss alerts, conflicting data, and the approved downtime process.

General learning goal / support / next review:

9. Professionalism

- ☐ Observe accountability, respectful communication, patient advocacy, and appropriate professional boundaries.
- ☐ Ask for examples of recognizing limits, clarifying uncertainty, and seeking help before proceeding beyond current ability or scope.

Assess: Use specific observed behaviors and the nurse's perspective. Address concerns promptly using the unit's process.

General learning goal / support / next review:

10. Personal, Professional, and Leadership Development

- ☐ Ask the nurse to reflect on one strength, one learning need, and a specific next action.
- ☐ Review whether feedback changes practice and whether fatigue, stress, or support needs are raised appropriately.

Assess: Compare agreed goals with later observations. Identify coaching, practice, and resources needed for the next review.

General learning goal / support / next review:

Before the final orientation review

- ☐ Gather evidence across relevant shifts and situations from more than one qualified assessor, using the employer's approved process.
- ☐ Record behaviors, context, outcomes, prompting, and remaining gaps in approved secure records. Separate not observed from not demonstrated.
- ☐ For unmet requirements or inconsistent safety behaviors, agree on supervision, targeted practice, and reassessment before expanding responsibility.
- ☐ Bring the evidence and the nurse's perspective to the authorized educator or leader. Document the assignment decision, limits, ongoing support, and next review through the facility's process.

Do not total ticks into a readiness score or use weeks completed as proof of competence. Simulation supports learning about uncommon situations; it does not replace required clinical validations.

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Observation and reassessment planner

Use this copy for general learning goals only. Keep identifiable assessment evidence in your organization's approved secure records. Separate **not observed** from **not demonstrated**.

Planned assignment / unit-specific criteria to review:

Domain / learning goal	Observation method / support planned	Next opportunity / review date

One priority for reassessment

Expected observable behavior and approved criterion:

Practice, teaching, and supervision to provide:

How and when progress will be reassessed:

Questions for the nurse, educator, or responsible leader:

References and companion guide

American Association of Colleges of Nursing. (2026). *The Essentials: Core competencies for professional nursing education.* aacnnursing.org/Portals/0/PDFs/Publications/Essentials-2026.pdf

American Association of Colleges of Nursing. (n.d.). *Essentials competency assessment.* aacnnursing.org/essentials/essentials-competency-assessment

American Association of Colleges of Nursing. (n.d.). *Progression indicators.* aacnnursing.org/essentials/tool-kit/domains-concepts/progression-indicators

Companion guide: rntransitiontopractice.com/new-nurse-readiness

Domain names follow AACN. Checklist actions and prompts are original workplace applications.

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