Unit transfer orientation checklist

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For an experienced RN moving to a new unit or specialty. Print and complete by hand. Original planning aid, not a validated assessment or competency sign-off. Follow local policies and approved orientation records. Exclude patient and employee identifiers; use roles rather than names.

1. Recognize experience and agree on the plan

Date: _____ Receiving unit / setting: _____

- ☐ Discuss recent practice, patient populations, responsibilities, and strengths.
- ☐ Compare the previous role with the receiving unit's expectations.
- ☐ Verify relevant prior learning through approved local processes.
- ☐ Separate verified capability, learning needs, and skills not yet observed.

Transferable strengths

What experience is relevant here? Record how it was verified.

New context and priority learning

What differs in this unit? What needs supervised practice first?

Support and review arrangements

Specify preceptor and backup roles, supervision, review date, and who makes formal readiness decisions.

Plan unit-specific learning

2. Discuss and track each applicable area

A tick means the area has been reviewed and its next step recorded, not that competence is established. Add local requirements. For each area, record prior evidence, what remains unobserved, and required learning in the approved record.

- ☐ Patient population, common conditions, and assessment priorities.
- ☐ Recognition of deterioration, emergency response, and escalation routes.
- ☐ Unit-specific therapies and medication processes within the role.
- ☐ Equipment, monitoring, supplies, and required local validation.
- ☐ Documentation, handoffs, communication, and care coordination.
- ☐ Patient and family teaching and specialty-specific resources.
- ☐ Infection prevention and other relevant unit safety processes.
- ☐ Workflow, prioritization, team responsibilities, and help-seeking.
- ☐ Required training and uncommon situations needing planned exposure.

Highest-priority learning activity

What will be practiced, against which approved criterion, and with what supervision?

Opportunity, resources, and backup

Who will arrange practice or rehearsal? What coverage or equipment is needed?

Additional unit-specific requirements

Add requirements not captured above.

Review progress and next steps

3. Repeat this page for each review or priority

Review date: _____ Learning focus: _____

Evidence from practice

What was observed, in what context, with what prompting or supervision?

Nurse and preceptor reflections

What is progressing? What remains unfamiliar? What has not yet been observed?

Next goal and support

State the next observable action, practice opportunity, supervision, and responsible role.

Next review date: _____ Support / backup role: _____

☐ Check that workload allows the planned supervision and learning.

☐ Review progress against approved criteria with the appropriate decision-maker.

☐ Agree on ongoing support after formal orientation, when applicable.

Do not use a total score or tick count to determine readiness. Follow local processes promptly for safety concerns. Additional time should have a defined learning goal and reassessment plan.

Companion reading: Kiss, J. (2026). *The complete preceptor handbook.* RN Transition to Practice. Research references and further guidance are available in the companion online guide.