

Preceptor Guidelines During Orientation

The purpose of the Preceptor Guidelines During Orientation document is to provide a tool that sets expectations regarding the role the preceptor plays in the new surveyor's orientation.

- Become familiar with the preceptor orientation materials.
- Communicate with the new surveyor about his or her learning needs before and after each survey experience using the enclosed evaluation forms. Do not assume he or she will let you know. Some individuals are reluctant to ask questions and may need encouragement to do so.
- Return evaluation forms with survey packet for supervisor review.
- Review the skills checklist with the new surveyor after each survey.
- Allow the new surveyor to observe, then perform with supervision, each task until he or she is able to demonstrate competency using the federal survey protocols.
- Challenge the new surveyor to give you the rationale and information source for decisions or answers to questions. The use of regulations and data gathering techniques should be emphasized.
- Provide time for the new surveyor to discuss and develop interview questions and an investigation plan.
- Review all survey findings and form documentation with the new surveyor prior to the new surveyor verbally sharing their findings with the facility staff.
- Note: Survey findings are shared verbally; surveyor notes or other documentation should never be shared with the provider.
- Collaboratively develop a training plan for the new surveyor prior to each survey that takes into account the new surveyor's learning needs.
- For the first month in LTC, depending on the new surveyor's learning curve and the complexity of the resident, do not assign him or her more than one chart in phase one and, if time permits, one in phase two.
- Provide ample time for the new surveyor to develop deficiency statements.
- Provide additional training on topics as needed keeping in mind preceptor survey assignments.
- Contact the training officer if problems arise or there are concerns.