Electronic Orientation Checklist: Click It to Check It!

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System Nursing Education Professional Development

Background
• In 2022, approximately 15,000 Registered nurses and 6,000 Nursing assistants were onboarded utilizing paper checklists across 26 hospitals. The 95 identified checklists required printing multiple pages and were cumbersome for leadership to monitor and access.

Purpose
• Nursing Education and Professional Development (NEPD) aimed to streamline checklists, enhance real-time documentation, and capture learning gaps.
• NEPD launched an electronic orientation checklist initiative. The checklists transitioned to electronic platform delivering an updated, comprehensive, and collaborative approach to system orientation resources.

Timeline
Figure 1 Implementation Timeline

Methods
• Electronic checklists were piloted at two sites, which allowed refinement of the approach for implementation in over 20 sites in three months.
• Feedback from stakeholders, including executive leadership, supported implementation across the Midwest region with a detailed timeline plan.
• Surveys were administered to evaluate effectiveness and garner feedback.
• Collaboration occurred with key partners to communicate and educate leaders and teammates using multimodal methods including:
  • Centralized location for implementation resources
  • Computer-based training
  • Virtual webinars
  • Focused leader sessions
  • Job aids
  • Just in time videos

Conclusion:
• The department leveraged an existing platform to transform orientation checklists across two states which resulted in substantial cost savings, cultivation of ecological consciousness and transformational interdepartmental collaboration.

Results
• Over 90 electronic checklists were migrated.
• Over 1000 leaders and educators attended education sessions.
• Leader feedback was positive regarding ease of use and review of teammate progress.
• Preceptors and teammates reported the electronic checklists were better than paper.
• Immediate learning gaps noted by preceptors and teammates.

Implications for Practice
• Since it is an evolutionary implementation, design monitoring and assessment of technology literacy is needed to influence the overall learning experience.
• A continued collaborative approach including timed content revisions and an expanded online orientation repository will continue to promote safe practice, standardization, cost savings and significant environmental impact.
• With the elimination of only two paper checklists, the organization can potentially save at least $150,000/year, or more, and influence environmental stewardship.
• In implementing two electronic checklists incorporating time and non-paper utilization for a pair of preceptor and orientee, the overall cost difference is above $1M, with a 50% Return on Investment.

Acknowledgements and References
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Figure 2: Information and Webinar Sessions

Timeline

Q1
Buy-in Planning
Communication

Q2
All sites Initial Checklist switch from paper to electronic

Q3
Reinforce Checklist Implementation

Q4
Beginning Design for Initial Competency

CNO
Communicate and buy-in

Kick-off
Communicate to NPDs and Managers

Support HealthStream webinars

Switch
All areas switch sometime in Q2

Remove Paper
June 30th remove paper versions from Hub

Assess
Review pilot, current state, plan for future

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