How to Use the Skills Checklists

Background

The skills checklists are step-by-step clinical procedure guides for newly hired care professionals and their preceptors or for established practitioners mastering a new skill or process.

- Skills checklists are reviewed regularly for currency and alignment to policy. The date of the last review is listed in the footer of each document.
- Skills checklists are housed on the CPPN website at https://health.ucdavis.edu/cppn/skills/index.html

Selecting the correct checklists

Obtain the appropriate skills packet:

- *All newly hired RNs* utilize the General Core Skills Packet and the Point-of-Care Testing Packet.
- Relevant additional packets may be needed, according to the new hire's specialty (for example, a newly hired PICU RN will complete the General Core Skills Packet *plus* the Children's Hospital Critical Care Skills Packet).

Getting started

Skills checklists and packets contain live links to relevant policies and other resources.

- If users save the PDF to a shared drive and work from it, the links remain usable and checkboxes on the first pages are fillable. Added benefit: electronically filling in name, employee number, unit, and title on the first page will populate that information to all pages of the packet.
- If users choose to print the documents and work on paper, the documents should be printed from the CPPN website just before they are needed to ensure the most recent version is selected.
    - For this reason, avoid printing multiple packets at once and storing them in a paper file.

Packet elements

Section 1, Master List: First page(s) includes:

- A list of Performance Criteria checklists in the packet OR a reference to relevant policies, which contain the key elements of the clinical procedures either in the body of the policy or via link to Elsevier Clinical Skills. In the latter case, it will state "Performs per Policy XX". See the policy for performance details. Skill verification occurs when the new hire performs per the policy criteria.
    - Note: Elsevier Clinical Skills is our evidence-based foundation for step-by-step clinical procedures. When appropriate, policy owners may embed links to Elsevier Skills into our policies to specify key elements of a clinical procedure.

Section 2, Signature Page includes:

- Space for signatures and clearly printed names of preceptors/verifiers
- Preceptee statement and signature

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Section 3, Skills Checklists (also known as Performance Criteria) on subsequent pages includes:

- Detailed steps of clinical procedures only if the Master List does not state "Performs per Policy XX" with a link to the corresponding policy.
  - If the Master List states "Performs per Policy XX", the corresponding policy will have the performance details, either in the body of the policy or via Elsevier Clinical Skills linked in the policy.

Completing the packet

The verifier (preceptor or designated verified personnel) uses the skills checklist as a guide to verify the learner has adequate mastery of each skill.

- The verification is documented on the Master List by dating and initialing the row.
- Mark any skills that are not applicable to the preceptee with "N/A".
- The verification method (for example, observation, return demonstration, simulation, or post-test) does not need to be specified on the form.
- All verifiers will also sign the Signature Page and print their name.
- When complete, the Master List (first 1-3 pages) and Signature Page are scanned and emailed to hs-cppn@ucdavis.edu
- The skills checklists themselves, after the Signature Page, are not submitted to CPPN.

General Information

Questions? Call Center for Professional Practice of Nursing at (916) 734-9790

or email hs-cppn@ucdavis.edu