



## **PRECEPTOR PROGRAM GUIDELINES**

### **Purpose:**

**PENS, a nonprofit organization, was founded in 1986, with the following stated purpose:**  
*“The members of this professional organization are committed to the advancement of the art and science of pediatric endocrinology nursing. This includes the establishment and continued development of standards of practice, the enhancement of nursing research, the advancement of clinical expertise, and the promotion and recognition of excellence in nursing practice.”* Excellence in nursing practice includes patient/family assessment, education, organization of service, and documentation of the care of the pediatric endocrine patient.

**There are many nurses new to the pediatric endocrine specialty. These new nurses have expressed a desire to learn the skills necessary to develop competence in pediatric endocrine nursing. Experienced nurses and nurse practitioners new to the subspecialty have also expressed a need to learn the most current techniques, case management skills, and protocols to keep abreast of the field, but many do not have the resources to do so. For this reason, the education committee developed the preceptor program.**

### **Development:**

**The education chair and committee developed the project in 1998. The chair manages the program or may select an education committee member to coordinate its administration. Applications and checklists have been developed for the program trainers (preceptors) and apprentices (preceptees). Nurses who apply as preceptors are identified as having pediatric endocrine expertise and the skills to orient the new nurse. Letters announcing the program were sent to PENS members, endocrine practices, and pharmaceutical representatives.**

## **Procedure:**

**Preceptors are recruited within the PENS organization. These members are nurses who provide direct patient care or education. They will discuss the program and its compliance with the Health Insurance Portability and Accountability Act (HIPAA) with the department director of their institution before volunteering. The completed ‘PENS Preceptor Application’ and ‘Department Director Recommendation Form’ is sent to the PENS Education committee for approval. A Preceptor Guide is sent to the preceptor and is reviewed prior to contacting a potential preceptee.**

**A nurse or health care professional new to the sub-specialty is identified via applicant associates, physicians, and/or pharmaceutical representatives and the preceptor education committee is notified. That preceptee candidate is sent information about PENS, a ‘membership application’ and ‘application for the preceptor program’. They must join PENS and send the preceptee application to the education committee. The member will indicate whether or not his/her employer has financial resources to assist the nurse in the site visit. If financial resources are available, the preceptee’s institution should expense his/her travel, meals, parking, and lodging. The application is reviewed, approved, and a copy is sent to a preceptor that meets the role and orientation needs of the preceptee.**

**Once PENS membership is verified, and acknowledgement for the program obtained, the nurse is contacted by the preceptor and sent the “Preceptee Manual”. The Manual includes information about PENS, ‘program guidelines’, ‘orientation checklist’, ‘evaluation form’, a ‘self-assessment tool’, a list of available educational materials, endocrine overview, pathophysiology summary, endocrine nursing tips, and stimulation testing information.**

**The preceptor and preceptee will make tentative arrangements for the nurse to visit the preceptor’s site for an observation visit for 2 to 3 days. The preceptee or preceptor will call or fax the estimate of travel costs (airfare/drive and hotel) for the site visit to the education committee for approval. Once approved, the travel arrangements may be made. Reimbursement will occur after the visit has been completed and the necessary forms have been sent to the education committee.**

**The preceptee is to complete the self-assessment tool prior to, immediately following, and 3 months after the visit. The visit enables the preceptor to orient the preceptee to pediatric endocrine nursing care, parent teaching, stimulation testing, organizational skills, and case management of the endocrine patient and medications. The skill checklist is utilized as a tool for the preceptor and preceptee to review the desired skills. Once the visit is completed, an ‘evaluation form’ is completed by the preceptor and Preceptee, a follow-up call is made by the preceptor, and potential contact at the next PENS meeting planned.**

**This program is intended for the nurses, nurse practitioners, or health care professionals new to the specialty of pediatric endocrinology, which practice in an institution or office setting providing direct patient care, care coordination, or education. It was developed as an observational and informational tool to assist the nurse in obtaining resource**

**information. PENS is not responsible for the nursing care provided by the preceptor or preceptee.**

**The preceptee will send the evaluation form, self-assessment tool, reimbursement form and receipts for travel to the education committee to be forwarded to the PENS treasurer for reimbursement. The preceptor will send the orientation checklist, preceptor evaluation form, and honorarium request to the education committee and the treasurer for reimbursement.**

### **Criteria for becoming a Preceptor**

- **PENS member in good standing who provides direct patient care or education.**
- **At least 2-5 years pediatric endocrine nursing experience.**
- **HIPPA compliance and completion of ‘preceptor biographical form’, ‘manager recommendation form,’ and program evaluation forms.**
- **Review of the program and its HIPPA compliance with their manager.**

### **Criteria for Preceptee**

- **PENS member in good standing who provides direct patient care, care coordination, or education.**
- **Completion of Preceptee Application.**
- **The member will indicate whether his/her employer has financial resources to assist the nurse with expenses related to the site visit.**
- **Agreement to comply with the program guidelines, HIPAA regulations, and completion of evaluation forms.**

### **Reimbursement Instructions for Site Visit**

1. **The education committee must approve the estimated cost of the site visit prior to visit arrangements.**
2. **PENS may reimburse for airfare (or gas for car travel), hotel for 1-2 nights, parking, meals, and transportation to the site.**
3. **The preceptee will complete the ‘evaluation form’, ‘self-assessment tool, and ‘reimbursement form,’ and attach receipts. The preceptor will complete the evaluation, orientation checklist, and honorarium request form. The forms will be sent to the education committee and then forwarded on to the treasurer.**
4. **The PENS treasurer will send the reimbursement (preceptee) and honorarium (preceptor) checks to the addresses designated on the reimbursement forms within four weeks.**
5. **If financial resources are available from the preceptee’s employer, the institution will expense the preceptee’s travel, meals, parking, and lodging.**

## **Evaluation**

The education committee will review the process, completed evaluations, and progress of the preceptor program semiannually. Current preceptors will be evaluated and may be asked to continue. New preceptors will be recruited. The Education Committee anticipates 6-12 preceptees per year to complete the program. The PENS President will submit a written request for an unrestricted educational grant from the sponsor annually.

## **Policy**

A summary of the rules and regulation of the program can be found in the PENS Policies.

## **Program Development:**

Colleen Weber, RN  
PENS Education Committee

## **Program Coordinator:**

Debi Kienstra  
PENS Education Committee

Developed: July 1998

Revised: May 2003

<b>Roles</b>	<b>Responsibilities</b>
<b>Education Chair/ Education committee</b>	<ul style="list-style-type: none"> <li>✓ Develop and coordinate the Preceptor Development Program.</li> <li>✓ Act as a resource to preceptors, preceptees, nurse associates, physicians, and pharmaceutical representatives.</li> <li>✓ Function as a role model.</li> <li>✓ Evaluate the Preceptor Program on an on-going basis.</li> <li>✓ Collaborate with PENS membership for maintenance of a current preceptor listing.</li> <li>✓ Submit proposal in collaboration with the president for continued funding.</li> <li>✓ Oversee the distribution of funding, reimbursement, and honoraria for the program.</li> <li>✓ Review the program materials and participants evaluations forms annually.</li> </ul>
<b>Preceptor</b>	<ul style="list-style-type: none"> <li>✓ Complete preceptor application. Review the program with department manager and have department manager complete recommendation form.</li> <li>✓ Acknowledge receipt of preceptor assignment.</li> <li>✓ Contact preceptee within 1-2 weeks. Assist with site visit arrangement within 1-3 months.</li> <li>✓ Ensure that there is approval for the estimated travel cost for the visit.</li> <li>✓ Orient preceptee to pediatric endocrine nursing utilizing the skills checklist as a tool. Comply with HIPAA Regulations.</li> <li>✓ Contact the preceptee after site visit and prior to PENS meeting.</li> <li>✓ Keep preceptor records and complete program evaluation.</li> </ul>
<b>Preceptee</b>	<ul style="list-style-type: none"> <li>✓ Join PENS. Complete the preceptee application.</li> <li>✓ Send the travel cost estimation to the education committee; make the travel arrangements after approval.</li> <li>✓ Collaborate with the preceptor on the planning/implementation of learning experiences that will facilitate the preceptee's achievement of specialty knowledge.</li> <li>✓ Assist in maintaining the Orientation Checklist as a tool.</li> <li>✓ Play an active role in the learning process by accepting responsibility for learning needs and experiences. Comply with HIPAA regulations.</li> <li>✓ Ensure commitment to the preceptorship program as emphasized by a willingness to learn. Demonstrate kindness, courteous, &amp; patience with one's preceptor and other institution staff.</li> <li>✓ Communicate with preceptor in a timely manner.</li> <li>✓ Complete the program evaluation and submit to education committee with reimbursement form for visit expenses.</li> </ul>
<b>Treasurer</b>	<ul style="list-style-type: none"> <li>✓ Facilitate incorporation of sponsor's educational grant into education committee budget for the program.</li> <li>✓ Reimburse the preceptee in accordance with policy.</li> <li>✓ Provide honorarium to preceptor for each preceptee oriented in the form of check or PENS voucher. This will be provided when the preceptor completes the program documentation and evaluation.</li> <li>✓ Submit financial summary to the program education committee.</li> </ul>
<b>President</b>	<ul style="list-style-type: none"> <li>✓ Submit the request for corporate sponsorship in a separate letter annually.</li> </ul>
<b>Pharmaceutical Sponsor</b>	<ul style="list-style-type: none"> <li>✓ Processes receipt of request for educational grant in a timely manner.</li> </ul>

## **Preceptor Program References/Resources:**

- 1. Wilson JD, Foster DW, Hormones and hormone action: Introduction In: Wilson JD, Foster DW eds Williams textbook of endocrinology, eighth edition. Philadelphia: WB Saunders Company, 1992.**
- 2. Stryer L Biochemistry, second edition, San Francisco: Wll Freeman and Company, 1981.**
- 3. Bedocs MN, Biggs D, Giordano B, Scott M. Review of the endocrine system. Indianapolis: Eli Lilly and Company, 1988.**
- 4. Recker B, Anatomy and physiology of the endocrine system In; Jackson DB, Saunders RV, eds, Child health nursing: A comprehensive approach to the care of children and their families, Philadelphia: JB Lippincott Company, 1993.**
- 5. Guyton, Arthur C. Textbook of medical physiology, 7<sup>th</sup> edition. Philadelphia, 1986, WB Saunders.**
- 6. Wong, Donna, Essentials of Pediatric Nursing, Mosby, St. Louis, 1993**
- 7. PENS Resource Manual**
- 8. Preceptor Program. Cardinal Glennon Children's Hospital, St. Louis, MO**
- 9. Preceptor Program. Montana Area Health Education Center, Bozeman, MT**