

# From Paper to Personalized: Transforming Perianesthesia Onboard Planning with Technology

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## BACKGROUND

Historically, onboarding across Outpatient Procedure Centers was paper-based and educator dependent, resulting in potentially inconsistent education and fragmented onboarding experiences-even among staff working side by side.

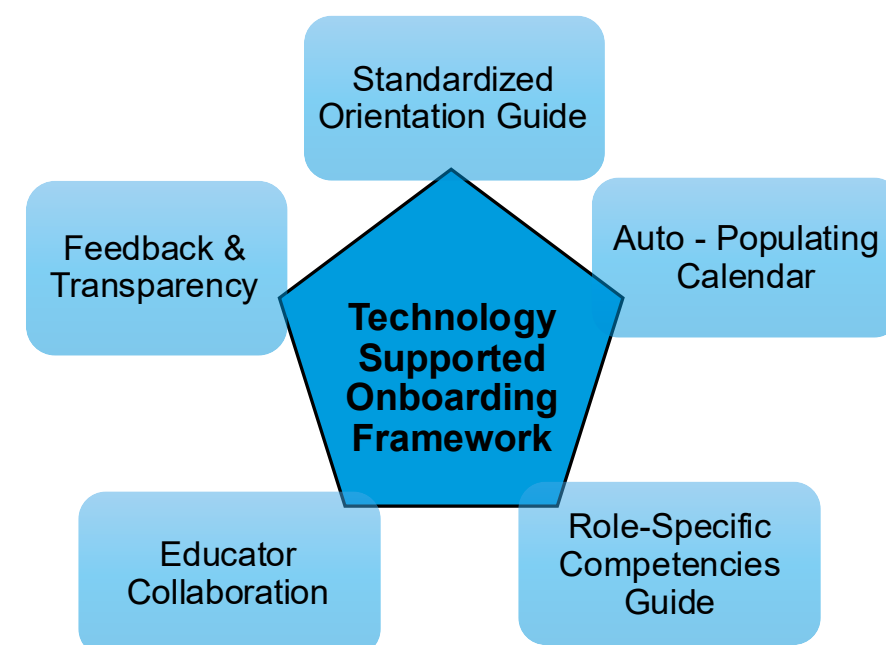
## OBJECTIVES

Implement a standardized, technology-enhanced onboarding framework that:

- Ensures consistency across Outpatient Procedure Centers
- Supports role-specific and individualized learning needs
- Aligns with ASPAN standards, institutional policy, Tiered Skill Acquisition Model (TSAM®) concepts and regulatory expectations

## METHODS

- Educators collaborated across Perianesthesia units to review onboarding practices
- Existing onboarding methods were consolidated to identify variation, gaps, and redundancies
- Practices were evaluated to distinguish:
  - Tradition-based processes (“how it’s always been done”)
  - Required elements aligned with ASPAN standards, institutional policy, Tiered Skill Acquisition Model (TSAM®) concepts and regulatory expectations
- Required elements and preferred workflows were transformed into a technology-enabled digital onboarding framework.



## TECHNOLOGY SUPPORTED FRAMEWORK

### STANDARDIZED ONBOARDING GUIDE TEMPLATE

- **Purpose:** A unified onboarding digital framework ensuring safe, consistent, and role-appropriate practice across surgical practice. Embedded links to planning tools and reference documents for ease of registration.
- **Components:**
  - Orientation planning**
    - Prior to start date planning checklist
    - Calendar build-out (variable course dates, progress reviews, etc.)
    - Educator and administrative setup tasks (email, online education, tracking)
    - Digital TSAM® competency assignments
  - Day 1 orientation structure**
    - Standardized Day 1 checklist for all staff (campus tour, unit tour)
    - Core system reviews and initial access
  - Role-specific orientation pathways**
    - Defined role-specific calendars, education, access, and competencies for:
      - Perianesthesia RNs
      - Patient Care Assistants
      - Technicians

### SHARED DIGITAL COLLABORATION SPACE

- **Purpose:** A centralized cloud-based location for onboarding planning documents, with variable accessibility to all team leadership members to support transparency, accessibility, and ease of use.
- **Components:**
  - Centralized storage of all onboarding materials**
  - Planning original documents**
    - Singular template documents of guide, calendar, observation day objectives for copying and individualizing to orientee needs
    - Communication templates for all major communications
  - Unit calendars**
    - Separated by each physical work location
    - Shared with managers and team leads specific to that area
  - Onboarding guides**
    - Separated by primary educator
    - Accessible to all educators for seamless coverage

### AUTO-POPULATING ONBOARDING CALENDAR

- **Purpose:** A unified auto-populating onboarding calendar for role-appropriate practice across Perianesthesia units.
- **Components:**
  - Fields for preceptee name, role, specialty, start date, and educator coverage
  - Institution-wide onboarding activities automatically populated (e.g., onsite orientation, department standard onboarding class)
  - Stored in cloud-based location for seamless access with leadership team
  - Dedicated calendar with expected timeline built in for role-specific requirements
  - Coincides with onboarding guide
  - Progression-based scheduling, identifying role specific tasks for weekly focus
  - Clearly identified progress reviews intervals, observation days, and specialty exposure weeks
  - Inclusion of float opportunities, self identified additional focus weeks, and specialty rotations

### EMBEDDED COMMUNICATION & FEEDBACK

- **Purpose:** A standardized approach to progress reviews and communication embedded within the onboarding process, providing clear touchpoints and shared visibility to support timely communication, transparency, and continuous improvement.
- **Components:**
  - Pre-hire communication templates and timelines**
    - Onboarding guide template lays out standard timeline to send communications to all new hires
    - Standardized orientee expectations and follow-up actions
    - Centrally maintained templates updated based on feedback and requirements
    - Highlighted components to update based on onboarding experience
    - Ensure feedback and recognition opportunities are standard and easy to access
  - Standardized progress review touchpoints in orientation guide template**
    - Guided reflection questions to support orientee feedback and educator assessment
    - Required facilitator documentation next steps and follow-up actions to support progression

## DISCUSSION

### INTERPRETATION OF PRACTICE CHANGE

- Transitioning from paper-based, educator-specific onboarding to a shared digital framework improved consistency while preserving role-specific customization.
- Collaborative development among educators reduced redundancy and increased alignment with ASPAN standards, institutional policy, Tiered Skill Acquisition Model (TSAM®) concepts and regulatory expectations.
- Centralized tools enhanced transparency, allowing educators and leaders to view onboarding progress and requirements in real time.
- The technology-enabled approach supported standardization, efficiency, and personalization, addressing a long-standing tension in onboarding design.

### PRACTICE INSIGHTS

- Standardization does not limit flexibility when technology is used intentionally.
- Shared tools promote educator collaboration and consistency across locations. Increasing efficiencies and decreasing time needed to tailor an orientation plan.

## IMPLICATIONS FOR ADVANCING THE PRACTICE OF PERIANESTHESIA NURSING

- A technology-enabled framework successfully unified onboarding practices.
- The model supports scalable, equitable Perianesthesia onboarding recognizing similarities and differences across all Perianesthesia roles.
- Digital tools can effectively balance standardization and individualized learning.

## REQUEST MORE INFORMATION



Sequence of events for transition from paper-based onboarding to a standardized, technology-enabled onboarding framework.