

Preceptor Evaluation: PMHNP Clinical Competency Tool

Evaluation Criteria	Did Not Meet Expectations	Met Expectations	Not Observed	Comments (<i>Required if criteria/expectations are not met</i>)
1. Obtains Comprehensive or Problem-Focused HPI Gathers pertinent details from patient/family/caregivers		✓		Needs to focus more on the DSM5 criteria and less on medical, unless it contributes to dx.
2. Performs Review of Systems (ROS) Thoroughly Identifies potential medical issues that may influence mental health		✓		Met expectation
3. Obtains Detailed PMH, FH, and SH Recognizes risk factors for psychiatric/medical comorbidities		✓		Met expectation
4. Performs Physical Exam (as indicated) - Uses appropriate techniques and equipment - Considers neuro/physical indicators related to mental health		✓		Was able to apply The Pscyhiatric Interview by Carlot in a clinical setting
5. Distinguishes Normal from Abnormal Findings Applies critical thinking to identify deviations from baseline		✓		We focused labs and screening tool metrics with exams.
6. Orders and Interprets Appropriate Diagnostics Rationalizes the need for		✓		Was able to look up appropriate labs for medications and lab/imaging to rule out organic causes.

labs/imaging to rule out organic causes		✓		
7. Synthesizes Clinical Information • Develops accurate differentials and a final diagnosis		✓		Was able to apply the DSM5 to accurate dx +
8. Formulates Evidence-Based Plan of Care • Follows clinical guidelines and best practices for mental health treatment		✓		Need work on creating nonpharmacological +
9. Safely Prescribes Medications • Considers side effects, drug interactions, allergies, and patient factors		✓		Was able to make medication recommendations for dx.
10. Integrates Non-Pharmacological Treatments • Recommends therapy, lifestyle modifications, and complementary approaches		✓		Was able to apply complementary approaches into treatment plan.
11. Promotes Health and Disease Prevention • Counsels on wellness, screening, and follow-up		✓		Was able to discuss lifestyle changes and conduct a motivational interview with pt.
12. Provides Anticipatory Guidance • Prepares patients/families for potential course of illness		✓		Met expectation
13. Communicates Findings Succinctly • Conveys assessment/plan to preceptor/team in timely manner		✓		Was able to give a report of condition changes that needed addressing.
14. Evaluates and Adjusts Interventions as Needed		✓		Met expectation

• Revises plan based on patient response/outcomes		✓		
15. Documents Thoroughly and Confidentially • Maintains legal and ethical standards in record-keeping				Met expectation
16. Assesses Readiness for Learning • Provides tailored education to patient/family based on health literacy		✓		Was able to apply healthy lifestyle to pt specific teaching.
17. Collaborates with Healthcare Team • Refers, consults, and coordinates care effectively		✓		met expectation
18. Practices Professional Behavior and Self-Efficacy • Demonstrates ethical, culturally sensitive conduct		✓		Met expectation
19. Engages in Self-Evaluation • Actively seeks feedback for continuous improvement		✓		Open to feedback and improvement
20. Considers Cost, Quality, and Access in Decision-Making • Recognizes barriers to treatment		✓		Met expectation
21. Utilizes Informatics and Technology Appropriately • Leverages EHR, telehealth, and data analysis to optimize care		✓		We are all learning IA based transcribing to optimize care.
22. Demonstrates Ability to Perform Basic or Indicated Procedures <i>(if within PMHNP scope)</i>		✓		Was able to use various assessment tools.

Learner Evaluation

She is able to connect with patients and talk with them about psychosocial stressors leading to mental illness.

- **Strengths of Learner**

- **Areas for Improvement**

We are working on applying various psychotherapy approaches with care. Need to focus on capturing the elements of DSM 5 DX in the note.

Signature & Date of Preceptor: Martin Apt PMHNP-BC 8/15/2025

Signature & Date of Learner: Donia M. Smith 08/15/2025

How to Use This Checklist

- **Did Not Meet Expectations:** The learner inconsistently or rarely demonstrates the skill or demonstrates it at a level significantly below what is expected for their current stage.
- **Met Expectations:** The learner consistently demonstrates the skill at or above the expected level.
- **Not Observed:** The skill was not required or not applicable during this rotation/encounter.

For any **Did Not Meet Expectations** rating, please provide **comments** describing the shortcoming and recommended actions or resources for improvement. This ensures the learner receives clear feedback to guide their development in advanced psychiatric-mental health nursing practice.