**PLANNING FOR LEARNING** // Learner Orientation Checklist

**Before Learner Arrives:**

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|  | Schedule a 30-minute orientation for the learner |
|  | Remind staff and partners of the impending arrival of the learner |
|  | Consider best workflow and scheduling for balancing efficient teaching and patient care |
|  | Display notice for patients indicating learners at work |

**When Learner Arrives:**

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|  | Introduce learner to staff and partners |
|  | Orient the learner to exam rooms, equipment, workspace |
|  | Review work hours, days off, and potential schedule conflicts |
|  | Review office rules and policies (dress code, parking, computer use, EMR, etc.) |
|  | Review the learner’s expectations for the rotation |
|  | Review your expectations for the rotation  |
|  | Co-create concrete learning goals with the learner |
|  | Review when and how teaching will occur and how feedback will be provided |
|  | Review patient scheduling and which patients the learner will see |
|  | Review how you want your patients presented |
|  | Review if you want notes written or dictated |
|  | Review which tests are performed in your office and how to schedule a consult |
|  | Review how to retrieve consult notes and test results |
|  | Review how to contact office/you in case of a personal emergency or unanticipated schedule conflict |
|  | Review how to handle an office emergency |
|  | Schedule a time at half-way and at the end of the rotation for learner evaluation and feedback |
|  | Schedule a time for learner to meet other community leaders (physicians, hospital, rotary club, etc.) |