
Learner Orientation Checklist

“A structured orientation is the foundation of a successful teaching and learning experience.”
(Paulman, P. et al. 2006. *Precepting Medical Residents in the Office*. Radcliffe, UK)

One Week Before Learner Arrives:

✓	
	Review institution’s learning goals and objectives
	Schedule a 30-minute orientation for the learner
	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.)
	Remind staff and partners of the impending arrival of the learner

When Learner Arrives:

✓	
	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, etc.)
	Review the learner’s expectations for the rotation
	Review your expectations for the rotation
	Create a learning plan for the learner
	Review when and how teaching will occur and how feedback will be provided
	Review when a midterm and final evaluation will take place
	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
	Review how to handle an office emergency
	Ask if learner has any questions about the learning experience to come