

Orientation Checklist
Introducing a Medical Learner to your Office

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| Welcome | |
| Introductions (Learner, Staff, Physician) – background, special interests, etc. | |
| Learning history – what rotations has the learner completed, long term career goals, clinical interests | |
| How would the learner like to be introduced? | |
| Exchange important contact numbers (both Learner and Physician) | |
| Overview of Rotation | |
| Review objectives | |
| Graded responsibilities/independence | |
| Call expectations/responsibilities (clerks and residents only) | |
| Daily/weekly schedule (clinic hours, hospital rounds, home visits, etc.) | |
| Opportunities to work with colleagues with other special interests | |
| Resources for independent study, computer access | |
| Learning Contract | |
| What are the learner’s expectations? | |
| How do they learn best? | |
| Complete learning contract together (identify 2-5 objectives to accomplish) | |
| Orientation to Clinic | |
| Introduce to clinic staff, have them explain their roles and how they will engage with learner | |
| Orient to layout of clinic, exam rooms, washroom, break | |
| Review chart system/electronic medical record | |
| Parking | |
| Orientation to Hospital | |
| Introduce to hospital staff | |
| Parking, cafeteria, break room | |
| Pager system | |
| Evaluations | |
| Discuss how evaluations will occur (planned, scheduled formal feedback and evaluation) | |
| Discuss how informal feedback may occur during rotation | |
| Welcome learner feedback | |
| Communication Plan | |
| Mode of communication (phone, text, provide contact information) | |
| Planned communication check in’s | |
| Agreed upon plan for informal feedback (various ways it may occur during rotation) | |
| Discuss how, if any issues arise, the learner can feel comfortable approaching Faculty or staff | |
| Other | |
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