## Here is a checklist that can be used by preceptors as they prepare to teach in the clinic/office.

### When the Learner Arrives, Orientation Checklist

Post notices in the reception area about the learner

Have the receptionist inform patients about the learner

Review with the learner the institution's learning goals & objectives

Review the "Clinical Skills Inventory" with learner

Review the learner's expectations for the experience

Consider signing a learning contract with learner

Review working hours

Review days off

Review potential schedule conflicts & attempt to resolve them

Review how to contact office in case of personal emergency or unanticipated schedule conflict

Review office rules & policies (eg., parking, dress code, meals, telephone & computer use)

Orient the learner to his or her personal workspace

Review contents of examination room & where equipment, supplies, & forms are located

Introduce learner to staff (including their responsibilities) & to partners

Review when & how teaching will occur

Review when & how feedback will be provided

Review scheduling & which patients the learner will see

Review how much time should be spent with patients

Review what parts of examination should & should not be done in your absence

Review how to organize the learner's time with the patient & you

Review how you want patients presented to you

Review how you want notes written or dictated

Review which clinical tests are performed in the office

Review how to order imaging studies & other diagnostic tests

Review how to schedule a consultation

Review how to schedule a follow-up appointment

Review where to retrieve patient education materials

Review how to retrieve test results

Review how to request a patient chart

Review when the final evaluation will take place

Review how to handle an office emergency (e.g., cardiac arrest)

From: Teaching in Your Office:
A Guide to Instructing Medical Students & Residents
http://www.amazon.com/Teaching-Your-Office-Instructing-Office-Based/dp/1930513070