

Teaching in Your Office Checklist

Before the Learner Arrives Preparatory Checklist

One Week Before the Learner Arrives

- ☐ Review the institution's learning goals & objectives
- ☐ Review the institution's orientation materials
- ☐ Review the student's information or application (if available)
- ☐ Have a reliable number for the institution's contact person in case of problems
- ☐ Have staff confirm that dates & times of the instruction in your office with the sponsoring institution
- ☐ Send any information the learner should know about the practice to the sponsoring institution for distribution to the learner
- ☐ Identify a parking place for the learner
- ☐ Identify a workspace for the learner
- ☐ Schedule a 30-minute orientation for the learner
- ☐ Schedule time midpoint at the end of the experience for learner evaluation & feedback
- ☐ Consider making a poster for patients stating that this practice is a teaching site (on CD)
- ☐ Consider setting up a schedule

Two to Three Days Before the Learner Arrives

- ☐ Remind staff & partners of the impending arrival of the learner
- ☐ Distribute copy of the learner's application or personal information (if available) to staff & partners
- ☐ Brief the staff on the learner's responsibilities
- ☐ Review with the staff their role with the learner
- ☐ Coach the staff on how to present the learner to patients
- ☐ Equip the workspace with needed references, paper, & writing utensils
- ☐ Gather forms (e.g. laboratory, physical therapy, radiology, consultation) for learner orientation
- ☐ Generate list of staff, their office locations, & a short description of their responsibilities (save in file)
- ☐ Make a list of what to cover during learner orientation
- ☐ If the learner will dictate notes, prepare instructions (save in file)

When the Patients Arrive Checklist

- ☐ Have the receptionist inform patients that you have a learner in the office today
- ☐ Distribute brochure or handout about the learner to patients, if available
- ☐ Ask the patient's permission before bringing a learner into the examination room
- ☐ Couch your request positively, e.g., "I have a medical student/resident working with me today. If it's okay with you, I'd like him/her to talk to you & examine you first. I will come in & see you afterwards."
- ☐ If you teach frequently, inform new patients that you work with learners
- ☐ Have the office staff inform you about any positive or negative feedback from the patients about the learner
- ☐ Consider measuring your patients' satisfaction with the learner by using a Patient Satisfaction Form

From: Teaching in Your Office: A Guide to Instructing Medical Students & Residents