**Sample Orientation Checklist**

**One Week Before Resident Arrives:**

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|  | Schedule a 30-minute orientation for the resident |
|  | Schedule a time at half-way and at the end of the rotation for resident evaluation and feedback |
|  | Schedule a time for resident to meet other community leaders (physicians, hospital, rotary club, etc.) |
|  | Remind staff and partners of the impending arrival of the resident |

**Orientation when Resident Arrives:**

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|  | Introduce yourself and get to know the resident |
|  | Review the resident’s learning goals and expectations for the rotation |
|  | Review your expectations for the rotation  |
|  | Review work hours, days off, and potential schedule conflicts |
|  | Review how to contact office / you in case of a personal emergency or unanticipated schedule conflict |
|  | Review office policies (dress code, parking, computer use, etc) |
|  | Orient the resident to exam rooms, equipment, workspace |
|  | Introduce resident to staff and partners |
|  | Review when and how teaching will occur and how feedback will be provided |
|  | Review patient scheduling and which patients resident 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 when a midterm and final evaluation will take place |
|  | Review how to handle an office emergency |