



## ORIENTATION CHECKLIST

Use this checklist as a reference for setting the stage on day one and ensuring the student is fully oriented to your clinical site. Thank you for your dedication to educating future PAs!

### **Welcome and Introductions**

- ☐ Introduce the student to all relevant clinical and administrative staff.
- ☐ Clarify each team member's role and how the student will work with them.

### **Facility Overview**

- ☐ Review the clinic/hospital layout, including waiting areas, exam rooms, and ancillary services (e.g., lab, radiology).
- ☐ Provide emergency procedures and safety protocols (e.g., fire exits, fire extinguisher location, eyewash stations, PPE, contacts for security).
- ☐ Provide reporting mechanisms (e.g. contact for preceptor in emergencies, site-specific emergency services if applicable, access to patient care areas, etc.).
- ☐ Provide procedures for reporting incidents (e.g. site administrator, needlestick, workplace injuries, etc.)

### **Site Policies & Procedures**

- ☐ Discuss pertinent administrative policies.
- ☐ Review specific scheduling or sign-in/out procedures.

### **Rotation Expectations**

- ☐ Discuss the student's expected schedule (minimum 40 hrs/week) and on-call or weekend requirements.
- ☐ Outline clinical objectives and goals the student should meet by the end of the rotation.
- ☐ Clarify procedures for absences or schedule conflicts (preceptor contact).

### **Clinical Responsibilities**

- ☐ Define the level of supervision for patient care, including which tasks require direct preceptor oversight.
- ☐ Explain how patient encounters are conducted (e.g., how long the student may



spend per patient).

## **Documentation Guidelines**

- ☐ Demonstrate how to access or chart in the EMR (if permitted) or the process for paper documentation.
- ☐ Clarify your expectations for documentation.

## **Teaching & Feedback Process**

- ☐ Explain your preferred teaching style (e.g., one-minute preceptor approach, case-based discussions).
- ☐ Schedule or plan for regular feedback sessions (daily or weekly) to address strengths, weaknesses, and progress.
- ☐ Encourage the student to pose questions and discuss learning goals throughout the rotation.

## **Patient Interaction Guidelines**

- ☐ Clarify the expected progression of autonomy: from observing to conducting more of the exam or forming assessments under supervision.
- ☐ Ensure every patient encounter and procedure is evaluated by a licensed provider before the patient departs.

## **Professional Conduct**

- ☐ Set expectations for dress code (e.g., white coat, ID badge) and communication etiquette.

## **Contact Information**

- ☐ Provide key contact information (yours, alternate preceptors, etc.) in case of questions or issues.
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