

free sample

Pre-Arrival Checklist

Free sample from the Resident Rotation Management Pack. Everything done before day one.

A one-page checklist the resident completes before day one.

Complete these before your first day. If anything gets stuck, contact [name] at [number]. Don't wait until Monday morning.

who to call

Key Contacts

ROLE	NAME	PHONE
Operations Manager	[Name]	[Phone]
Residency Coordinator	[Name]	[Phone]
Preceptor	[Name]	[Phone]
Front Desk	[Name]	[Phone]
IT Help Desk	[Name]	[Phone]

your goals

My Rotation Goals

Take five minutes before day one to write these down.

Career interests:

Skills I hope to improve:

2 weeks out

2 Weeks Before

- ☐ Confirm your start date and report time with [\[name\]](#)
- ☐ Request EHR access, complete any required EHR training, and confirm your login works (test it, don't assume)
- ☐ Arrange badge and building access (submit your badge photo ahead of time if required)
- ☐ Complete required compliance modules: [\[list\]](#)
- ☐ Submit immunization records or health clearance if required, including mask fit testing: [\[where\]](#)
- ☐ Ensure BLS/ACLS certification is current and send a copy to [\[who\]](#) if required

1 week out

1 Week Before

- ☐ Read the full welcome packet
- ☐ Confirm parking plan and know where your badge grants access
- ☐ Save the key contacts above in your phone: operations manager, preceptor, front desk

☐ Submit emergency contact info to [who]

☐ Know the call-off process — [who to notify and how] — before you ever need it

☐ Review the rotation goals you wrote above and your program's learning objectives: [where to find them]

the day before

The Day Before

☐ Prepare attire: scrubs, visible badge, white coat

☐ Pack bag: stethoscope, badge, login credentials, notebook

☐ Know your destination: [clinic name], [building], [floor/room], [directions]

☐ Plan to arrive 15 minutes early. [Report time] means [report time]

☐ Arrange lunch: [cafeteria on site? nearby spots?]. If no cafeteria, bring your lunch

If stuck on anything above, contact [name] at [number]. We'd rather fix it now than on a busy Monday morning.

Disclaimer: Adapt to your site's policies and program requirements. This is a starting template, not legal or compliance advice.

This checklist is piece 2 of the 6-piece Resident Rotation Management Pack — the complete onboarding system for clinic resident rotations. [Get the full pack here.]

the full pack

Get the Full Pack

This checklist is one of seven documents in the **Resident Rotation Management Pack** — the complete onboarding system for outpatient clinic resident rotations.

Here's what it buys you:

- **Day one runs itself.** Access requests, credentialing, schedules, and expectations — sequenced with owners and deadlines from 4 weeks out to the end of week one. No more residents sitting idle because a login didn't provision.
- **Expectations in writing.** Every resident gets the same standards — attendance, call-offs, documentation, after-hours call — before they start. Fewer "nobody told me" conversations.
- **Competency you can actually see.** Thirteen observable competency areas rated 1–5 by PGY level, with periodic reviews and an end-of-rotation entrustment decision. You'll know exactly where each resident stands.
- **Feedback that closes the loop.** An anonymous resident survey covering objectives, safety, supervision, well-being, and culture — so patterns surface before they become problems.
- **Built by someone who does this.** Not a consultant's template. This is the system a working primary care operations manager runs every day across 4-week cohort cycles.

The full pack includes:

- **Resident Welcome Packet** — everything the resident needs before day one
- **Cohort Schedule Template** — the 4-week cycle, daily structure, and operations playbook
- **Competency Sign-Off Checklist** — observable competencies rated 1–5 by PGY level
- **Resident Feedback Form** — anonymous ratings and open feedback that close the loop
- **EHR & Access Onboarding Sequence** — every access task, owner, and deadline, with a rotation-readiness sign-off
- **Pack Overview** — the piece that ties it all together

Every document comes as a designed PDF, a plain print-ready PDF, and an editable Word file.

Get the full pack here: [\[PACK-LINK\]](#)