UNITY HEALTH
TORONTO

Learner Placement Onboarding and Exit Checklists for Preceptors/Supervisors

The following checklists are resources to help both preceptors and learners maximize the quality of the educational experience. These checklists are a guide and can be adapted. There are three (3) different checklists that will help preceptors and learners prepare for placements; pre -placement, at the beginning of placement and at the end of placement.

Pre-Placement Checklist

Task	☑	Person Responsible : Preceptor/Supervisor or MCP or Education lead (or designate)
Placement administrative details	☐	Confirm upcoming placement dates with your Unity Health education lead (e.g. MCP, PPL)/educational institution contact
	☐	Direct any questions that you have to your Unity Health education lead
	☐	Review all relevant placement materials - refer to Unity website Teaching Resources Quick Links section
	☐	Make sure that your correct contact information has been provided to the learner(s)
	☐	Check your Unity Health email for any correspondence from learners
	☐	Create a placement schedule (with co-supervisor if applicable)
Communication	☐	Respond to the learner's initial email and include: Welcome message & instructions for first day of placement Remind learner to complete onboarding requirements
	☐	If possible, schedule a pre-placement meeting with learner
	☐	Share expectations related to level of learner preparedness (e.g. resources and tools to review prior to, and/or have on hand during placement) with learner
	☐	Ensure your manager is aware of the learner placement dates
Resources	☐	Think about workspace & identify where the learner will do their work (including documentation), store their belongings and take breaks
	☐	Discuss required resources for the placement

UNITY HEALTH
TORONTO

Day One of Placement Checklist

(*If you cannot cover all tasks on day one, please complete within first week of placement)

Task	☑	Person Responsible : Preceptor/Supervisor or MCP or Education lead (or designate)
Orientation to Placement Area	☐	Provide program /unit specific orientation-walking tour of spaces
	☐	Share any specific orientation tricks for way finding to your area
	☐	Provide discipline /area specific safety training
	☐	Check that the learner has access to area specific IT applications (e.g. connect learner with the Student Centre contact)
Feedback & Role Clarity	☐	Discuss how and when feedback will be provided to the learner and received by you
	☐	Know when and who to contact if you have any concerns of questions regarding the learner's performance or any placement incident
	☐	Review your role as a preceptor and the role of the learner
	☐	Review role of other team members who might be part of the learner's practice
Initial discussion **Daily Routine and Expectations**	☐	Confirm start times, break times and end times
	☐	Discuss expectations related to professional conduct (e.g. arriving on time, cell phone usage)
	☐	Review process for reporting absences
	☐	Review process for reporting on-site health and injury related incidences
	☐	Review placement schedule
	☐	Review your preferred teaching/learning style and have learner share theirs
Learning and Development	☐	Review access to relevant libraries, online databases and educational materials
	☐	Review opportunities for attending Unity Health educational opportunities

UNITY HEALTH TORONTO

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Completion of Placement (Last Day) Checklist

Task	☑	Person Responsible : Preceptor/Supervisor or MCP or Education lead (or designate)
Final Evaluation	☐	Ensure final evaluation is completed, reviewed with the learner and submitted - as per educational institution's processes. Consider scheduling the final evaluation ahead of time in calendars to protect time for this process.
Return of placement site property	☐	Remind learner to return ID badge to the Student Centre or Security
	☐	Remind the learner to return any site resources used for placement
Feedback	☐	Make sure that the learner has completed the Learner Experience Survey that is sent to their email used to register in the Student Registration System (likely personal or school email)
	☐	Provide and receive feedback from the Learner related to the placement experience (areas for improvement)