

APPENDIX Q: Trainee Planning Timeline and Checklist (template)

[\(click here to return to text\)](#)

Adapted from the Global Child Health Educational Modules Project “Preparation for Global Health Electives” preparation packet, St Clair et al, AAP and CUGH, 2013

For residents whose programs have established GH electives, refer to program-specific checklists.

PERSONAL REFLECTIONS AND REVIEW OF MOTIVATIONS

- ☐ Why do you want to do this? Can your goals be accomplished in a local elective?
- ☐ Will you be able to carry out this elective in a way that emphasizes a respectful, mutually beneficial partnership with the host institution and staff, without imposing burdens on the local health facilities?
- ☐ Are you willing to put time into preparing adequately for this experience, including clinical and cultural preparation?
- ☐ Have you considered your tolerance for travel uncertainties and risks, uncomfortable living conditions, challenging cultural expectations, disease and injury exposure, high morbidity and mortality, and frustrations about inabilities to help?

12 TO 16 MONTHS PRIOR TO DEPARTURE

- ☐ Ensure that your residency program can offer salary support during a GH elective
- ☐ As soon as you are interested in a GH elective, begin networking with potential mentors (faculty and other residents)
- ☐ Schedule call-free elective time (consider season and travel challenges at host site if possible)
- ☐ Consider where you would like to work and what you would like to do (if elective sites are not already offered through your program). Your options may be influenced by language abilities, preferences for hospital or clinic work/urban or rural setting, and availability or lack of appropriate supervision on site. After identifying your goals and preferred elective site characteristics, contact your program's GH advisor, if there is one, and/or organizations and other academic institutions offering GH elective opportunities.
- ☐ Consider expenses and apply for funding if available

8 TO 12 MONTHS PRIOR TO DEPARTURE

- ☐ Select your U.S.-based GH faculty mentor
- ☐ Consider your goals and objectives (keeping in mind the goal of a mutually beneficial partnership between you and your institution and the host institution) and review with your mentor
- ☐ Based on your personal goals (and institutional partnerships, when applicable), choose an elective opportunity that is best aligned with your goals
- ☐ Contact the host supervisor at the elective site to inquire about availability and suitability based on their structure and your timeline/interests
- ☐ Acquire and begin work on necessary applications, noting deadlines and requirements
- ☐ Determine who will be your supervisor at the host site
- ☐ Submit any required forms to your program (eg, applications, program letter of agreement, etc). Note that submission deadlines will vary by institution.
- ☐ Begin reading/viewing recommended readings, videos, and learning modules pertinent to your GH elective
- ☐ Start language training if needed. Note that learning basic courtesy phrases at the least is very helpful.
- ☐ Dialogue with someone who has worked at your host site
- ☐ Learn more about the country's health status, disease profile, health priorities, political structure, and priority issues, as well as about the city and community that you plan to visit

6 MONTHS PRIOR TO DEPARTURE

- ☐ Secure your housing and daily transportation arrangements to/from the workplace (housing arrangements may not be feasible this far out in some regions, and may need to be arranged closer to the date)
- ☐ Apply for a medical license or work permit if required (may require copies of your current license, Drug Enforcement Administration [DEA] card and diplomas)
- ☐ Apply for a passport or ensure that yours will not expire for at least 6 months after you return. Note: Ensure that you have at least four blank pages in your passport (and more if you plan to travel through multiple countries) to allow for country entry/exit stamps
- ☐ Determine how to obtain a visa, if applicable, and how long this will take
- ☐ Make an appointment with the travel clinic for immunizations, malaria prophylaxis, and HIV post-exposure prophylaxis, and to review your current health and routine medications. Check the [CDC](#) website for outbreaks or special recommendations.
- ☐ Check for [U.S. State Department travel advisories or warnings](#). Discuss any concerns with your mentors.
- ☐ Determine what diagnostic resources will be available on site. Collect helpful books and resources to take with you.
 - Consider purchasing the WHO manual “*Pocket Book of Hospital Care for Children: Guidelines for the Management of Common Illnesses with Limited Resources (2nd ed)*” (or [download the free PDF](#))
- ☐ If necessary, begin collecting purchased or donated supplies (eg, gloves, masks, syringes, etc) for your personal use and/or for the host site. Review precautions regarding donated medical supplies ([Appendix K](#)).

3 MONTHS PRIOR TO DEPARTURE

- ☐ Plan itinerary and purchase airline tickets
- ☐ Obtain emergency medical evacuation insurance (if not already covered by your institution), and submit a copy to your faculty mentor
- ☐ Make sure you understand your health, disability, and malpractice insurance coverage
- ☐ Obtain an international driver's license (if you will be driving; try to avoid driving if at all possible for safety reasons)
- ☐ Review packing list and begin collecting necessary items (some resources or items may need to be ordered)
- ☐ Inquire about cell phone availability (international plan for your cell phone or borrowing/purchasing phone on site) and determine plans for communication with home contacts
- ☐ Identify who your on-site interpreter will be, if needed
- ☐ Ensure clinical coverage in your absence, including notifying continuity clinic of planned elective dates
- ☐ Ensure that all paperwork has been submitted to the host institution and residency program
- ☐ Begin preparations for specific responsibilities and academic projects at the elective site

2 MONTHS PRIOR TO DEPARTURE

- ☐ Confirm lodging and travel plans (pick up at airport; have a back-up plan if no one shows up)
- ☐ List your emergency contacts (home and on site) for your advisor or program coordinator
- ☐ Set up a secondary email account (eg, Gmail) because professional accounts can be problematic in certain settings
- ☐ Scan important documents such as passport, itinerary, evacuation insurance card/information, and medical license and email copies to yourself, your emergency contact, and your faculty mentor (including secondary email account) so that they are available electronically wherever you are
- ☐ Meet with your advisor to update your personal and educational objectives. Ensure that a discussion occurs pertaining to coping skills surrounding death and dying in resource-limited settings.

1 MONTH PRIOR TO DEPARTURE

- ☐ Make arrangements to maintain your home life (pet care, house maintenance, etc)
- ☐ Purchase trip-specific items (mosquito net, luggage locks, headlamp, etc) and continue working on the packing list
- ☐ Register online with the U.S. State Department STEP program (formerly known as “registering with the embassy,” now the [Smart Traveler Enrollment Program](#)).
- ☐ Review occupational exposure guidelines from your institution
- ☐ Obtain any necessary prescription and nonprescription personal medications, including post-exposure prophylaxis, malaria prophylaxis, bed nets, and other routine medications
- ☐ Obtain cash after determining what type of currency is needed for exchange in your country of destination. Most countries require newer (and crisp) U.S. dollar bills issued after 2003 and will not exchange bills less than \$20. In some areas, you should also have numerous small-denomination bills available. Speak with others who have traveled to the site to determine how much cash to have on hand. Consider bringing at least several \$100 bills for back-up cash. Visit travel websites (eg, [Fodor's](#)) for information about exchanging money while abroad, and also seek country-specific advice, as the availability of automated teller machines varies widely.
- ☐ Schedule your debriefing interview and any required presentations with your faculty mentor
- ☐ [Recheck](#) for new travel advisories pertaining to your elective site

1 TO 2 WEEKS PRIOR TO DEPARTURE

- ☐ Review luggage restrictions and items not permitted
- ☐ Finish as much of packing as possible to determine items still needed
- ☐ Confirm emergency contact information (at home and at site)
- ☐ Confirm your arrival with site officials (and confirm your back-up plan for airport pick-up)
- ☐ Weigh your luggage to make sure it does not exceed the limit
- ☐ Finish any notes, charts, dictations, or patient-related follow-up or sign-out
- ☐ Set auto-reply for emails
- ☐ Download or print any resources/documents that are important for your work, as internet access and speeds will likely be unreliable
- ☐ [Stop your postal mail delivery](#)
- ☐ Start your malaria prophylaxis when indicated
- ☐ Call credit and debit card issuers to arrange for payments during your absence and to notify them of planned international travel
- ☐ Pack your emergency contact card in a location that will be on your person at all times ([Appendix E](#))
- ☐ Pay other bills as necessary

AFTER YOU RETURN

- ☐ Allow extra time for rest and reflection
- ☐ Expect “reverse culture shock”
- ☐ Debrief with your faculty mentor to review the patient log and overall experience, including cases involving mortality
- ☐ Seek friends and colleagues who are eager to hear about your experiences
- ☐ Summarize and present your experience as required by your program
- ☐ Complete evaluation forms
- ☐ Provide feedback to others who may be going to that site
- ☐ Obtain PPD testing or interferon gamma release assay (eg, QuantiFERON), per your occupational health department) 3 months after you return
- ☐ Meet with occupational health if there were any occupational exposures during your elective