

# Fellowship Education Advisory Committee

## Clinical Fellowship Offer Letters: Guidelines and Exemplars

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# Clinical Fellowship Offer Letters: Guidelines and Exemplars

## **Introduction**

*The exemplars in the following pages originate in clinical fellowship offer letters in use across a number of University of Toronto postgraduate medical departments. These exemplars illustrate ways of providing key content in clinical fellowship offer letters. Please note that a single offer letter would not include all of the exemplars.*

*By collecting these exemplars in one document, the FEAC seeks to give fellowship programs a resource for assessing the completeness of offer letters, including the option to select or adapt text which best meets the needs of the individual fellowship offer.*

## **Guidelines: 8 Essential Statements for Offer Letters**

In June 2014, the FEAC finalized *Guidelines for Educational Responsibilities in Clinical Fellowships* (<http://www.pgme.utoronto.ca/content/policies-guidelines>) with the assistance of legal counsel. The document includes a list of eight essential statements for clinical fellowship offer letters (other terms may be developed as required by the institutions involved):

- 1. A statement of the duration of the fellowship, including the start and end dates**
- 2. A statement that the relationship between the fellow and the University is educational only and does not constitute an employment relationship with the University**
- 3. A statement that the fellowship is subject to legal and policy and professional requirements of the clinical site**
- 4. A statement that the fellowship supervisor will provide the clinical fellow with a copy of the educational goals and objectives of the fellowship, as approved by the Vice Dean PGME**
- 5. A statement that successful completion of the fellowship's goals and objectives shall entitle the fellow to a Certificate of Completion, issued by the University of Toronto and its Office of Postgraduate Medical Education**
- 6. A statement that the fellow may be placed on probation or be subject to remediation**
- 7. A statement that the fellowship may be terminated earlier for cause for performance reasons**
- 8. A statement that the fellowship program shall endeavour to provide a reasonable opportunity for the clinical fellow to attain the written goals and objectives of the fellowship**

## ***A Note on the Authorship of Offer Letters***

The department hosting the clinical fellowship experience is responsible for making decisions about the eligibility of applicants, for communicating with applicants regarding eligibility, and for processing the clinical fellowship appointment. Authorship of the fellowship offer letter therefore rests within the department hosting the clinical fellowship.

Cross-departmental appointments involve appointing a trainee as a clinical fellow in a discipline in which the trainee has not been recognized as a specialist (such as the appointment of a General Surgeon to a clinical fellowship in Otolaryngology). The FEAC, in consultation with the CPSO, developed a template for the educational objectives of cross-departmental appointments (<http://www.pgme.utoronto.ca/content/cross-departmental-clinical-fellowship-appointment-request>). Completion of this template, like authorship of the cross-departmental fellowship offer letter, rests within the department hosting the clinical fellowship.

## ***Exemplars***

The following departments contributed sample clinical fellowship offer letters to the FEAC for the preparation of this document: Anaesthesia, Critical Care Medicine, Medicine, Medical Imaging, Ophthalmology & Vision Science, Otolaryngology – Head & Neck Surgery, Paediatrics, Paediatric Critical Care Medicine, Pathobiology & Laboratory Medicine, Psychiatry, Radiation Oncology, and Surgery.

The relationship between the University of Toronto and a clinical fellow is an educational one only; this document therefore deals only with the educational component of clinical fellowship offer letters. This collection of exemplars does not include the following considerations:

- Remuneration and benefits
- Vacations and leaves
- Hospital code of conduct
- Respect in the workplace
- Privacy and confidentiality of information
- Prevention of violence and harassment in the workplace
- Hospital credentialing
- Workplace Safety and Insurance Board (WSIB)

This collection of exemplars consists of extracts from actual offer letters, minus departmentally specific content. The examples have been organized according to the following four themes:

1. Clinical Fellowship Pre-Conditions
2. Clinical Fellowship Activity
3. Supervision and Evaluation
4. Acceptance of the Clinical Fellowship Offer

## 1. Clinical Fellowship Pre-Conditions

### a) Start date requirement:

- This offer is contingent upon *fulfillment* of the requirements of licensure by the College of Physicians and Surgeons of Ontario and registration with the Postgraduate Medical Education Office, Faculty of Medicine, University of Toronto, such that the fellowship starts no later than *[specified date 60 to 90 days from target start date]* or this offer is void.
- This offer is contingent upon fulfillment of the requirements for licensure established by the College of Physicians and Surgeon of Ontario (CPSO), and registration with the Postgraduate Medical Education Office, Faculty of Medicine, University of Toronto, such that the fellowship starts no later than *[insert date]* or this offer is void.
- The planned start date of the fellowship is *[date]*. If you are not able to start on *[date]*, this offer is null and void. However, the planned start date may be revised if delays are encountered in obtaining a work permit or meeting the registration requirements of the College of Physicians and Surgeons of Ontario. The duration of the fellowship will be *[duration]* with a completion date of *[date]*. Any such change to the start and end dates must be approved by the fellowship supervisor and/or the Departmental Fellowship Program Director for the fellowship to proceed.

#### ***Optional Recommendation:***

- *If you are unable to commence the Pre-Entry Assessment Program (PEAP) between [start date and end date] this offer may be rescinded.*

### b) Conditional Multiple-year fellowship offer (applicable only in the case of fellowships of two or more years' duration):

- Your appointment to the University will end on *[date]*. If you are successful in the first half of your fellowship and wish to extend your training, a second year placement may be negotiated after 5-6 months of appointment.
- The Clinical Fellowship position is for one year but may be extended for an additional year at the discretion of the Program Director and Clinical Fellowship Training Committee if additional clinical training and experience is required.

**c) Registration requirements:**

- Licensure, Malpractice Insurance, Registration, Work Permit Processing:

You are responsible for:

- i. Work permit for non-citizens: The University of Toronto Postgraduate Medical Education Office will provide you with the necessary authorization to obtain a work permit upon receipt of your application and final approval of your appointment to the University. You will be responsible for applying for the work permit upon receipt of instructions from the University.
- ii. College of Physicians and Surgeons of Ontario (CPSO) medical license: you must apply to the CPSO for a certificate of registration for Postgraduate Medical Education (or Independent Practice, if applicable) well in advance of the start of your training to ensure you will be granted a license on time to begin the program.
- iii. Malpractice insurance: you must apply to the Canadian Medical Protection Association (CMPA) for membership so that you will have appropriate malpractice insurance on time to commence the program.
- iv. Health coverage (UHIP/OHIP): the Ontario Health Insurance Plan (OHIP) covers basic health care costs and is available for Canadian citizens/permanent residents. It is also available for international trainees (and accompanying family members) on work permits if their training appointment is at least 6 months in duration. University Health Insurance Plan (UHIP) coverage must be purchased if trainees or their accompanying family members are ineligible for OHIP.
- v. Registration: You are expected to fully register with the Postgraduate Medical Education Office, Faculty of Medicine, University of Toronto, and with the hospital medical education office before you commence your program.

**d) Educational Objectives:**

- The educational goals and objectives of this fellowship are attached and will be forwarded to the College of Physicians and Surgeons of Ontario (CPSO) with the approval of the Vice Dean PGME as part of the requirements for your licensure as a clinical fellow.
- The specific goals, objectives and requirements (as approved by the Vice-Dean PGME) of your fellowship are listed in the enclosed document, and the fellowship program shall endeavor to provide reasonable opportunity for you to attain these goals and objectives.

## 2. Clinical Fellowship Activity

### a) Definition of the clinical fellowship:

- The fellowship will provide clinical, research and educational training in the following area: [*name of the fellowship*].
- Training undertaken during a clinical fellowship cannot be recognized for credentialing purposes as training leading to certification by the Royal College of Physicians and Surgeons of Canada or the College of Family Physicians of Canada.

### b) Division of fellowship activity into academic and clinical components:

#### **Academic Responsibilities**

***Please note that fellowship programs will want to adopt or adapt selected content from the listing of exemplars below, as appropriate to the individual fellowship offer. A single offer letter would not contain all of the content in this section.***

- [*Percentage*] of the time, or [*number*] days per week (averaged over the year) will be dedicated to academic activities.
- The academic time dedicated to a research project will be granted based on the following criteria:
  - i. The fellow is actively involved in research protocol development, ethics submission, project implementation and manuscript writing
  - ii. Project submissions will include a one-page summary outline the plan, milestones and deliverables, and reviewed on a quarterly basis
- You will be responsible for the following:
  - i. Participating in all educational activities, such as journal clubs, rounds, [*details*]
  - ii. Participating in research projects: planning, coordinating, implementing one or more projects; trial data analysis, presenting results at local, national, and/or international meetings; preparing final, peer-reviewed manuscripts for publication.
- Protected academic time is assigned to all fellows for the purpose of carrying out research projects. Research must be conducted on-site, meaning that you must be in the Department on your research days.

- At the completion of the fellowship, the Department requires fellows to prepare one manuscript, suitable for publication, for each year of fellowship training. The Department also expects fellows to prepare at least one hour-long lecture for each year of fellowship training.
- As described in your fellowship application, as a Fellow you will be expected to undertake or collaborate or support research studies under the mentorship of your research supervisor. You must report to your supervisor for matters concerning your research and through your supervisor to *[name of Divisional Chair]*. The division of time between clinical and research activities will be negotiated between you and your supervisor.
- As part of your research, you will be expected to participate in the Fellows' Research Seminars, research day, and to undertake teaching duties as required within the postgraduate residency training program.
- *[Name of hospital site]* is extremely active at the levels of undergraduate, postgraduate, continuing and public education, and as a clinical fellow it is expected that you will take an active part in these activities. You may also be expected to teach/supervise medical students and residents who are assigned to *[name of the division]* and you may be called upon to teach in some courses and other educational events.
- To participate in all academic activities, including but not limited to:
  - i. Presentations of patients at weekly Divisional Rounds
  - ii. Presentation of cases and discussion of their peri-operative course at Morbidity and Mortality Rounds
  - iii. Reviews of topics assigned for discussion at didactic rounds
  - iv. Participation in the supervision of interns and residents
  - v. When appropriate, responsibility for some teaching of undergraduate medical students
  - vi. Undertaking of one or more clinical research projects leading to presentation and publication
- The goal of our program is to provide advanced academic training in *[name of specialty/subspecialty]*. Because research and creative professional activity are integral components of academic medical practice, all *[name of specialty/subspecialty]* fellows are assigned protected academic time for the purpose of carrying out research. You should discuss your research plans with your supervisor as early as possible. If you wish to start your project at the outset of your training, you should send your proposal (including protocol and expected milestones) to your supervisor well in advance of your fellowship start

date. Upon completion of your fellowship, you will be required to prepare a full manuscript of your year's academic work in a format similar to that used for journal submissions.

- As part of your Fellowship, you will be expected to participate in the Fellows' Research Seminars, Journal Club, Research Day, and to undertake occasional teaching duties within the Postgraduate Residency Training Program in the University of Toronto [*name of department*].
- The Division will support the expenses incurred by a fellow to attend a conference during the term of the fellowship up to a total amount of [*amount*] provided that the fellow is presenting research studies carried out during their fellowship. Presentation of such research studies at multiple conferences, or at conferences that take place beyond the term of the fellowship will not be covered by [*name of division/department*], but may be negotiated on a case-by-case basis with the fellow's own supervisor(s).

### **Clinical Duties**

***Please note that fellowship programs will want to adopt or adapt selected content from the listing of exemplars below, as appropriate to the individual fellowship offer. A single offer letter would not contain all of the content in this section.***

- The program includes a [*specified extent*] clinical commitment (approximately [*number*] shifts per month) in [*name of hospital site*] and commitment to related oversight, teaching, administrative and other related duties at [*name of hospital site*]. You must successfully complete the [*specified*] components in order to be considered successful in overall program completion.
- Clinical fellows are responsible for providing in-house on-call coverage as part of their program.
- You will be under the supervision of a University of Toronto appointed [*specialist*] when providing clinical patient care.
- Call shifts are typically [*number of hours*] in duration, without the next day off. When it is necessary for the [*third call*] fellow to work in the hospital past midnight, they will not be expected to work clinically on the following day.

- You will be responsible for the following:
  - i. Attending [number of *hours*] clinical per week. [*Number of hours*] of remaining time will be protected so that you may carry out your research.
  - ii. In-patient consultations [*details*]
  - iii. In-house on-call [*number of hours*] per month/per year
  - iv. Providing coverage for in-house staff, as required
- The Chief Fellow will do all necessary roster schedules in coordination with the fellows. You will be required to be available (on call) on a rotational basis with the other fellows in the Department.
- You will be assigned to [*name of division hosting fellowship program*], reporting to your supervisor, [*name of supervisor*], or whom they will designate, and through them to the Chair of the Division, [*name of Chair*], and ultimately to the Physician-In-Chief, [*name of Physician-In-Chief*]. As required for all clinical fellows, we will develop a training program with you to meet your educational objectives with a focus on [*details*] and understanding of [*details*]. It is also expected that you will participate in educational activities that enhance your knowledge and skill in the practice of [*name of specialty/subspecialty*]. You are expected to work in a collegial manner with team members, and consult your supervisor on cases as appropriate. You are expected to use and support both individual and group approaches to treatment with your patients.
- We offer advanced training for fully trained [*specialists*]. However, the [*name of Department*] at the University of Toronto is committed to the training of [*name of specialty*] residents and therefore residents are given priority when delegation of responsibility is appropriate.
- To participate in all clinical duties in [*name of the Division*], including:
  - Admit patients, record their medical history and physical examination in clinic and ward environment
  - Assist in [*clinical setting*] under supervision of the attending [*specialist*]
  - Consult on patients on medical wards, ICUs, outpatient clinics and emergency department
  - Make rounds in the various hospital units assigned, order appropriate medications, tests and other forms of therapy required for continued care, plan discharge with nurse clinicians and charge nurse, and write a daily progress note in the chart where appropriate
  - Finish the term, which means staying until the end of their arranged fellowship

- Demonstrate a collaborative ability with residents, other health care providers and other clinical fellows
- You will be responsible for the following:
  - To perform all requested consults (e.g. history, physical, assessment, plan and dictation of consult notes for inpatient service within three (3) working days of request
  - To perform new clinic consults and follow up visit assessments and dictation in a timely fashion as a consultant with appropriate supervision i.e. be able to run a parallel clinic to the attending staff.
  - To perform at least three (3) half-day outpatient clinics scheduled per week
  - To perform relevant patient administrative and or clinical forms
  - To review paper admission forms in determining the suitability for inpatient rehabilitation
  - To participate in multidisciplinary team rounds and chair family conferences when appropriate
  - To be exposed to current research carried out in the rehabilitation programs
  - To attend and be involved in continuous educational learning with postgraduate academic half days weekly and the monthly grand rounds in the [*name of division/department*]
  - To present education or best practice rounds at least two times during fellowship
  - To perform education of more junior trainees, e.g. junior residents, medical students and interprofessional students
  - To be involved in a team research project for presentation as poster at the annual [*name of conference*] and other meetings as deemed appropriate. If you pursue a 2 year fellowship it is expected you will be actively involved in preparation and submission to ethics board review, sample size calculation, recruitment of subjects, data collection data analysis and preparation of poster for presentation and manuscript for publication.

- In the first year, your fellowship is 80% research and 20% clinical; the second year is 80% clinical and 20% research.

The components of your job description have been sent to you previously. In the research component, opportunities in clinical and basic science projects will be designed based on your interests and available timelines.

- In-hospital call and home call are a mandatory educational component of the clinical fellowship. In-house call of approximately three days per month is required for this Fellowship. Out of hospital home call of approximately two days per month is required.

**c) Changes to the clinical fellowship:**

- Any proposed changes to your duties or responsibilities will be discussed with you and other affected physicians by the Chief of the Division and by the Physician-In-Chief, to ensure that your input and comment are obtained prior to approval and implementation.

If the division of duties to be performed at [*name of hospital site*] is changed, the educational goals and objectives of the fellowship will be revised as necessary and submitted to the CPSO with the approval of the Vice Dean PGME.

- Should unforeseen and unlikely circumstances exist where your supervisor is no longer able to practice but funding is still available, efforts will be made to find an appropriate alternative supervisor.
- Should unforeseen and unlikely circumstances exist where the funding arrangements for the fellowship position are no longer viable, the offer may be withdrawn or the fellowship terminated at that time.

### **3. Supervision and Evaluation:**

#### **a) Pre-Entry Assessment Program (PEAP):**

- If you are an international medical graduate you must obtain an educational license which is issued by the Ontario College of Physicians of Ontario ([www.cpso.on.ca](http://www.cpso.on.ca)). As mandated by the CPSO, all clinical fellows who obtained their specialty certification outside of Canada or the U.S. must pass the Pre-Entry Assessment Period (PEAP). This assessment period is supervised by your supervisor and is done in the first 4-12 weeks of your clinical fellowship. Failure of the PEAP will result in the CPSO not issuing a full educational license and termination of the fellowship. Information about the PEAP can be found at: <http://www.pgme.utoronto.ca/content/pre-entry-assessment-program-peap>.
- Please note that the PEAP is carried out as part of the fellowship; it does not extend the fellowship training period in any way.

#### **b) Performance evaluation and outcomes**

- The fellow will receive evaluations from his/her supervisors at completion of every rotation or more frequently for rotations of 6 months or longer during the fellowship. Fellows will have an opportunity to provide anonymous feedback on faculty supervisors with whom they have worked during their fellowship year and on the fellowship program itself.
- When the fellowship has been completed and the final in-training evaluation report confirms that the educational goals and objectives have been fulfilled, the Faculty of Medicine will issue a certificate verifying successful completion of the fellowship.
- The fellowship may be terminated at any time with the mutual consent of the clinical fellow and the supervisor, with Departmental approval.
- You will be given semi-annual evaluations, or more frequent if appropriate, by faculty during the fellowship outlining progress and areas for improvement. Fellows will have the opportunity to provide anonymous feedback on their supervisors and the training program.

#### **Optional Recommendation:**

- *Should circumstances arise where remediation, probation or suspension may be necessary, or where termination of the fellowship may be necessary, decisions will be made in accordance with the Guidelines for Educational Responsibilities in Clinical Fellowships, as posted on the Postgraduate Medical Education (PGME) website at <http://www.pgme.utoronto.ca/content/policies-guidelines>.*

#### **4. Acceptance of the Clinical Fellowship Offer**

- I understand that any misrepresentation made by me in connection with my candidacy for this clinical fellowship will be just and sufficient cause for withdrawal of the fellowship by *[name of department]*.

I understand and accept the terms and conditions of this clinical fellowship as outlined on the attached Educational Objectives and Job Description.

*[Clinical Fellow signature and date]*

- I have read this Letter of Fellowship Job Offer, as well as the accompanying Fellowship Information and the Educational Objectives for the Clinical Fellowship. I accept this offer of clinical fellowship training.

*[Clinical Fellow signature and date]*

- To accept this training offer and allow us to proceed with your appointment to the University of Toronto, please sign this letter and return by *[date]*. Because there are a number of University and government formalities that can take up to 6 months to complete prior to your registration, please reply promptly to this offer. Failure to return this letter by the specified date will be interpreted as non-acceptance and the offer will be withdrawn.

Also, please note that the relationship between the fellow and the University is educational only and does not constitute an employment relationship with the University. The fellowship is subject to legal, policy and professional requirements of the clinical site.

## APPENDIX: Optional Considerations

### Observership Option:

- This offer is conditional upon successful completion of a mandatory period of Observership. Should this element fail to be met successfully, as determined by the Program Director and Training Committee, the offer will be withdrawn.

### Pre-Offer Cover Page:

*Date*

*Candidate's name and address*

Dear *[Name]*,

Congratulations! It is with great pleasure that *[hospital]* invites you to join one of the world's top *[specialty]* hospitals. The fact that you were chosen for this role from among many outstanding candidates speaks to your achievements and your potential for success.

At this time we are very pleased to confirm our offer to you starting *[start date]* for a Fellowship Appointment with *[Department/Division]*. The terms and conditions of our offer are as set out in the attached offer letter and appendixes dated *[date]*.

Please carefully review the provisions of *[hospital]*'s offer and confirm your acceptance by signing and returning all required documentation to *[hospital]*.

Should you have any questions about your appointment, please do not hesitate to contact *[applicable contact person managing fellowship offers]* by e-mail at *[email address]* or phone at *[phone number]*.

Once again, welcome to the *[hospital]* team! We hope you are as excited as we are to play a part in the future of *[hospital]* and we would be delighted to have you as a member of our team.

With warm regards,

*[Signature Block]*