

POSTGRADUATE MEDICAL EDUCATION

SCHULICH SCHOOL OF MEDICINE & DENTISTRY

**POLICY ON PROGRAM RESPONSIBILITIES IN CLINICAL
FELLOWSHIP EDUCATION**

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PREAMBLE

This purpose of this policy is to outline the required processes and procedures for application, selection, registration, educational objectives and assessment of clinical fellows. This policy does not apply to residents, trainees in Royal College Area of Focused Competence (AFC) programs, research fellows, or trainees in a Subspecialty Examination Affiliate Program (SEAP).

Clinical fellowship training is intended to provide postgraduate medical training outside of the specialty or subspecialty training requirements of the Royal College of Physician and Surgeons of Canada (RCPSC) or the College of Family Physicians of Canada (CFPC).

Fellowship training does not lead to certification by the RCPSC or CFPC.

DEFINITIONS

- 1. Resident:** Residents are trainees enrolled in a Royal College or CFPC accredited training program, including Royal College subspecialties and CFPC Enhanced Skills. Residents are eligible for certification from the RCPSC or CFPC.
- 2. Clinical Fellow:** Clinical fellows are physicians who are acquiring post-certification training. According to the Medicine Act, 1991 fellows must meet the educational requirements for certification as a specialist by the Royal College of Physicians and Surgeons of Canada (RCPSC) or the College of Family Physicians of Canada (CFPC), or a member board of the American Board of Medical Specialties, or be recognized as a medical specialist in the jurisdiction where the applicant practices medicine immediately before the appointment as a clinical fellow.
- 3. Research Fellow:** Research fellows are in a research program, and do not have any patient or clinical contact. Research fellows do not require a license from the College of Physicians and Surgeons of Ontario (CPSO). Research fellows must hold a medical degree from an accredited medical school in order for their training to be registered through the PGME office.

REGISTRATION WITH PGME

All clinical fellows must be registered with the Postgraduate Medical Education (PGME) office. The relationship between the fellow and Western University is educational only and does not constitute an employment relationship with the University. The PGME office is responsible for informing the fellow of all registration requirements that must be completed prior to the training start date, and for providing all supporting documentation for University registration, CPSO, and immigration application requirements.

The Schulich School of Medicine and Dentistry, Western University, through the PGME office, academic departments and fellowship directors will endeavour to provide a reasonable opportunity for the clinical fellow to attain the written objectives of the fellowship. This will include provision of feedback throughout the fellowship, and supervision in compliance with the [CPSO Policy on Professional Responsibilities in Medical Education](#).

If fellowships are not in compliance with the Schulich School of Medicine and Dentistry PGME Fellowship Policy, PGME has the right to close the fellowship program.

REFERENCES

- [Clinical Fellow Probation, Suspension and Termination Policy](#)
- [Fellow Moonlighting Policy](#)
- [PEAP Policy](#)
- [CPSO Registration Requirements](#)
- [CPSO - Professional Responsibilities in Medical Education](#)

RESPONSIBILITIES FOR CLINICAL FELLOWSHIP EDUCATION

Refer to Figure 1 for a flowchart of the appointment process, and Table 1 for Fellow Responsibilities for Application.

1. Fellowship Program Organization

All clinical fellowships must have a designated fellowship director. The fellowship director will oversee the organization, administration and operation of the fellowship program. The fellowship director must have an official affiliation with the University through their respective Department. The fellowship director may be the same person as the educational supervisor.

The educational supervisor is responsible for overseeing the training, mentoring, supervision and assessment of the fellow.

2. Program Information, Application and Selection Process

The fellowship program must provide a description of the fellowship program and clearly outline the requirements and deadlines for fellowship application on the program website.

The fellowship program must have a formalized, fair and transparent application and selection process. Criteria for fellowship selection (application review, interview requirement and format for example) must be posted on the program website.

3. Resources

The fellowship director must review the planned number of fellows with the affiliated residency Program Director to ensure that fellowships will not negatively impact residency training. The Department Chair or delegate will make the ultimate decision on the number of fellows.

4. Fellowship Funding

Fellowships without salary funding are not permitted. All fellowships must include a salary sufficient to cover the estimated basic cost of living in South Western Ontario, London or Windsor. The minimum is \$50,000 per annum.

There are four acceptable sources of funding for a clinical fellowship:

I. Sponsored:

The fellow's salary and a tuition payment is provided by their home country. To be sponsored, the fellow must be a citizen of one of the countries with which Western has a contractual agreement in place (Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, United Arab Emirates, Yemen).

II. Department-funded:

The Division or Department is paying the fellow's salary from a university or hospital account. The minimum allowable annual salary is currently \$50,000 CAD.

III. External funding:

External funding can come from a Canadian industry or from an institution such as a hospital, university, employer or government agency in their home country. The salary funding must be a minimum of \$50,000 CAD.

Before an offer is made to an international fellow who indicates they have funding from a source in their home country, they must provide a document from their funding source, signed and on letterhead, confirming that funding will be provided, the duration of funding, and the annual amount in CAD. This requirement does not apply to sponsored applicants as their funding process is different and they cannot provide confirmation of funding before receiving an offer.

IV. Self-funded:

Self funding is only allowed if the fellow is RCPSC or CFPC-certified and holds an Independent Practice or Restricted license from the CPSO, and is therefore able to bill for services, for example by surgical assisting or other clinical work that their licences will permit.

There must be a very clear plan communicated to the fellow for the work that will be done, and this must be written into the letter of offer. The program must be able to provide specific information to the fellow about available locums, rather than allow the fellow to find their own opportunities. As well, the remunerative work must be accommodated within the fellow's work schedule, not in addition to the full-time fellowship hours.

The PGME office does not provide salary, administrative or operational funding for fellowship programs.

Fellows are not included in the Professional Association of Residents of Ontario (PARO) collective agreement. Leaves during fellowship are funded at the discretion of the fellowship program, or subject to the policy of the sponsoring agency.

Extensions of fellowship training are at the discretion of the fellowship director and the PGME office.

5. Timelines

Programs must inform the PGME office of a new clinical fellowship appointment:

- a minimum of 8 months in advance of the anticipated training start date for fellows who are international citizens, and
- a minimum of 4 months in advance for fellows who are Canadian citizens.

Fellowship training extensions must be provided to the PGME office a minimum of 3 months in advance of the fellow's current training end date, and 6 months in advance if the fellow is sponsored.

6. Application Requirements

- I. For Canadian and International Applicants not sponsored by their home country, applications are provided directly to the fellowship program. At a minimum, the application must include:
 - Letter of Application with Personal Statement of Interest
 - Up to date Curriculum Vitae,
 - Letters of Reference (three)
 - Copy of medical degree, with certified English translation if necessary
 - Copy of specialty certificate, with certified English translation if necessary
 - Proposed area of study
 - Proposed duration of Clinical Fellowship training
 - Copy of photo page of passport
- II. Internationally Sponsored Fellows are citizens of the countries that Western has an agreement in place with for fellowship training, as follows: Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the United Arab Emirates.

Internationally Sponsored fellows must apply through their sponsoring agency, which will then submit their application to PGME after confirming the applicant's eligibility for scholarship, and PGME will share the application with the program.

Applications made directly to clinical programs must be discarded. If a program is contacted by a sponsored applicant or if a current sponsored trainee refers a colleague, inform the PGME office and provide the candidate's name and country of citizenship or contact information. PGME can then vet that the candidate is eligible for sponsorship, and refer the candidate to their sponsoring agency to apply through the correct channel.

7. Educational Objectives

Clinical fellows must have educational objectives against which they will be assessed. Clinical fellowship educational objectives are provided to the CPSO by the PGME office as a requirement of the fellow's application for registration with the CPSO.

The fellowship program must provide the clinical fellow with a copy of the educational objectives of the fellowship. The fellowship program must use the [PGME Fellowship Objectives Template](#).

8. Change in Training Category or Educational Objectives

If the objectives of the fellowship are changed or modified, this change must be documented in writing and signed by both the fellowship director and fellow. The revised fellowship objectives must then be provided to PGME; PGME will provide the revised objectives to the CPSO. The CPSO requires this information as part of the licensing requirements.

9. Assessment of Fellows

Assessment of fellows must occur on a regular basis. Written assessments are required every 3 months at minimum, using an ITER type format. These assessments must be discussed with the fellow, and the discussion must be documented in writing.

Additional forms of assessment such as case reviews, 360^o evaluations, review of written communication such as notes/dictation, OSCE, or written or oral examinations are encouraged but not required.

Assessments will be provided by the fellowship director to the Associate Dean, PGME on request.

If deficiencies are observed by the supervisor, these deficiencies must be communicated to the clinical fellow in a documented meeting and a written assessment, of which a copy of the latter is to be provided to the fellow. Where, in the opinion of the fellowship director or educational supervisor, there are deficiencies in the progress towards the objectives, a fellow may be placed on a probationary program in accordance with the Clinical Fellow Probation, Suspension and Termination Policy.

10. Concerns about Supervision

Where, in the opinion of the fellow, there are serious deficiencies in the efforts of the supervising and collaborating clinical faculty members to provide a reasonable opportunity for the fellow to attain the objectives of the fellowship or serious deficiencies in those faculty members' compliance with the CPSO's Policy on Professional Responsibilities in Postgraduate Medical Education, the fellow will notify the Associate Dean PGME in writing. The Associate Dean PGME will review the progress of the fellowship. If the review supports the opinion of the fellow, the Associate Dean PGME will undertake corrective action, in consultation with the relevant parties, including the Academic Department Chair (or delegate).

11. Eligibility Requirements

I. Work Permit

Fellows who are not citizens or Permanent Residents of Canada must hold a closed, employer-specific work permit issued by Immigration, Refugees and Citizenship Canada (IRCC).

Clinical fellowship appointments are contingent upon the fellow's ability to obtain immigration clearance to work in Canada by the appointment start date in the form of a work permit from

IRCC. The fellow's appointment with the University is conditional upon satisfactory immigration status maintained for the duration of the appointment. Should the fellow fail to comply with this requirement at any time during the contract period or should the fellow compromise their legal right to remain in Canada in any way, the appointment with Western University is terminated immediately and without notice.

Fellows who are international citizens will be provided the necessary documentation and instructions to apply for a work permit by the PGME office, fellowship programs are not responsible for this aspect. Work permit processing time ranges from 4 to 50+ weeks. International clinical fellows may not travel to Canada until their work permit application has been approved by IRCC, therefore it is important to allow a minimum of eight months processing time between the fellowship start date and the date that the program informs the PGME office of a new international fellowship appointment.

II. Medical Degree and Specialty Certification

Clinical fellows must have been awarded a medical degree from an accredited Canadian or US medical school as defined in the [Ontario Regulation 865/93: Registration](#) or a doctor of osteopathy degree as defined in the [Doctor of Osteopathic Medicine](#) policy, or an acceptable international medical school as defined in the [Ontario Regulation 865/93: Registration](#) or in the [Alternatives to Degrees in Medicine from Schools Listed in the World Directory of Medical Schools Published by the World Health Organization](#).

They must also have successfully completed a residency training program or the equivalent in Canada or elsewhere, and hold certification as a specialist by the Royal College of Physicians and Surgeons of Canada (RCPSC) or the College of Family Physicians of Canada (CFPC), or as a member of the American Board of Medical Specialties, or be recognized as a medical specialist in the jurisdiction where the applicant practices medicine immediately before the appointment as a clinical fellow.

Postgraduate clinical fellows must be [eligible for a certificate of registration](#) authorizing postgraduate education with the College of Physicians and Surgeons of Ontario (CPSO).

III. Professional Liability Protection

Clinical fellows will be provided instructions to apply for professional liability protection from the Canadian Medical Protective Association (CMPA), and are required to have active coverage prior to engaging in clinical care.

Clinical aspects of clinical fellow learning are subject to the policies, rules and regulatory compliance of the hospital or other clinical setting.

IV. Immunization record requirements

Before a fellow can be cleared to start training, they are required to complete a full health review, instructions for which are provided by Medical Affairs 60 days in advance of the training start date. Fellows are required to provide a Health Screen form and proof of immunizations to Occupational Health & Safety Services. More information can be found [here](#).

V. Vulnerable sector screening

The CPSO applications requires submission of a Canadian Criminal Record check; more detail is found on the [CPSO website](#).

VI. English Language Testing

English language tests are not required.

VII. University Health Insurance Plan (UHIP)/Ontario Health Insurance Plan (OHIP)

Personal health insurance coverage is mandatory and the fellow will be instructed to apply for coverage from OHIP. Coverage will be active from the date of arrival, once an application is submitted. For more extensive coverage, Western University has the University Health Insurance Plan (UHIP). There is a cost for UHIP coverage, which the fellow would be responsible for and which will vary depending on the number of people who need coverage. Fellows are not required to obtain UHIP coverage but must have personal health insurance coverage, either OHIP, UHIP or through a private provider of their choosing.

Fellows sponsored by Saudi Arabia have personal health insurance which is facilitated by the Saudi Arabia Cultural Bureau, but are able to apply for OHIP.

VIII. Workplace Safety Insurance Board (WSIB)

Hospital policies apply:

- [London Health Sciences Centre \(LHSC\)](#)
- [St. Joseph's Healthcare Centre \(SJHC\)](#)
- Windsor
 - [Procedure to be Followed in the event of Workplace Injury: Windsor Campus](#)
 - [Occupational Health & Safety E-Orientation, Windsor Regional Hospital and Hotel-Dieu Grace Healthcare](#)

IX. Pre-Entry Assessment Program (PEAP)

All internationally-trained clinical fellows who have not completed any postgraduate training in Canada or the USA must complete a Pre-Entry Assessment Program (PEAP) prior to full acceptance into a fellowship program.

The PEAP is an assessment process that evaluates certified international medical specialists to determine whether they can function at the level of Ontario trainees who have completed their primary certification, and are qualified to enter an Ontario fellowship program. It is a mandatory 4 to 12 weeks in duration, is concurrent with the fellowship training program, and serves to provide assessment of the candidate's general knowledge, skills (both technical and communication), judgment and competence in the designated specialty and the designated level of training for which the candidate is pursuing a clinical fellowship.

The PEAP must be successfully completed in order to complete the fellowship training program. If a candidate is not successful in the PEAP, the fellowship appointment is terminated. See the [Schulich PGME PEAP Policy](#).

12. Offer Letter

The program must prepare and issue an Offer Letter for all new and extended clinical fellowship training appointments. The Offer Letter is the first step in the process after a program has selected a candidate. The fellow must sign and return the Offer Letter, which is their indication of acceptance of the fellowship offer.

Fellowship programs must use the Western University Offer Letter template, which is available by contacting the International Trainee Coordinator in the PGME office.

Programs are welcome to use their own Offer Letter in addition to the Western Offer Letter, which must be used.

13. Notification of Training Appointment (NOTA)

To notify the PGME office of a new or extended fellowship appointment, the program must complete a Notification of Training Appointment (NOTA) form, located [here on the PGME website](#). Page one of the NOTA is filled out by the program with the fellow's relevant training information. The second page of the form is then signed by the fellowship supervisor or director, the Program Director of the accredited residency training program, the Department Chair or Divisional Chair/Chief, and by the Manager of Administration & Finance of the Department if the fellow is being funded by the program.

The program then sends the completed and signed NOTA form, signed offer letter, fellowship objectives, and the fellow's documentation as listed on page one of the NOTA to the [Fellowship Coordinator](#) in the PGME office. The appointment will not be processed until the NOTA has been signed by all parties and all documentation has been submitted by the program. The fellowship appointment is conditional on the final approval of the Associate Dean of PGME.

14. Orientation

The fellowship program must have an orientation process for fellows. This should include components of the training environment, medical records, dictation services as required, and the guidelines and policies applicable to the fellowship.

15. Extension of Training

Programs must provide an offer letter to the fellow for a training extension that exceeds the original training end date of the initial offer letter. When a fellow sign and accepts the extension offer, the program must notify the PGME office following the same procedure as the initial appointment; a Notification of Training Appointment (NOTA) form must be prepared and signed by all parties, and sent to the PGME office along with the signed offer letter and revised training objectives that include any additional objectives for the extended training.

Fellowship training extensions must be provided to the PGME office a minimum of 3 months in advance of the fellow's current training end date, and 6 months in advance if the fellow is

sponsored.

Clinical fellowship training duration is subject to the CPSO policy “Postgraduate Education Term for Clinical Fellows”. The CPSO will renew a certificate of registration for up to 5 years, provided that the fellowship training remains in the same program and enrollment is continuous; the certificate automatically terminates at the end of the fifth year of the clinical fellowship.

16. Clinical Fellowship Program Approval

Departments must provide the PGME office with the Objectives of the fellowship, and include support from the Chair and Program Director that ensures that the fellowship will not adversely impact residency training.

The Notification of Training Appointment (NOTA) form is signed by the fellowship supervisor or director, the Program Director of the residency training program, and the Department Chair or Divisional Chair/Chief to confirm their review and approval of the fellowship appointment.

17. Certificate of Completion of Training

The Certificate of Completion of Fellowship Training is awarded by the Fellowship Supervisor or Director and the Associate Dean, PGME on behalf of the Schulich School of Medicine and Dentistry. The Certificate is verification that the fellow has successfully completed the training requirements of the fellowship. Certificates are requested by the fellowship program, and the request is made to the PGME office which then prepares the certificate document.

The Certificate includes the signatures of the fellowship supervisor or director and the Associate Dean, PGME. The fellowship program provides the information to include on the certificate in the request form they provide to the PGME office.

There is no cost for the initial certificate issuance. If the certificate is lost or damaged and a new certificate is required, PGME will issue a replacement certificate for a fee.

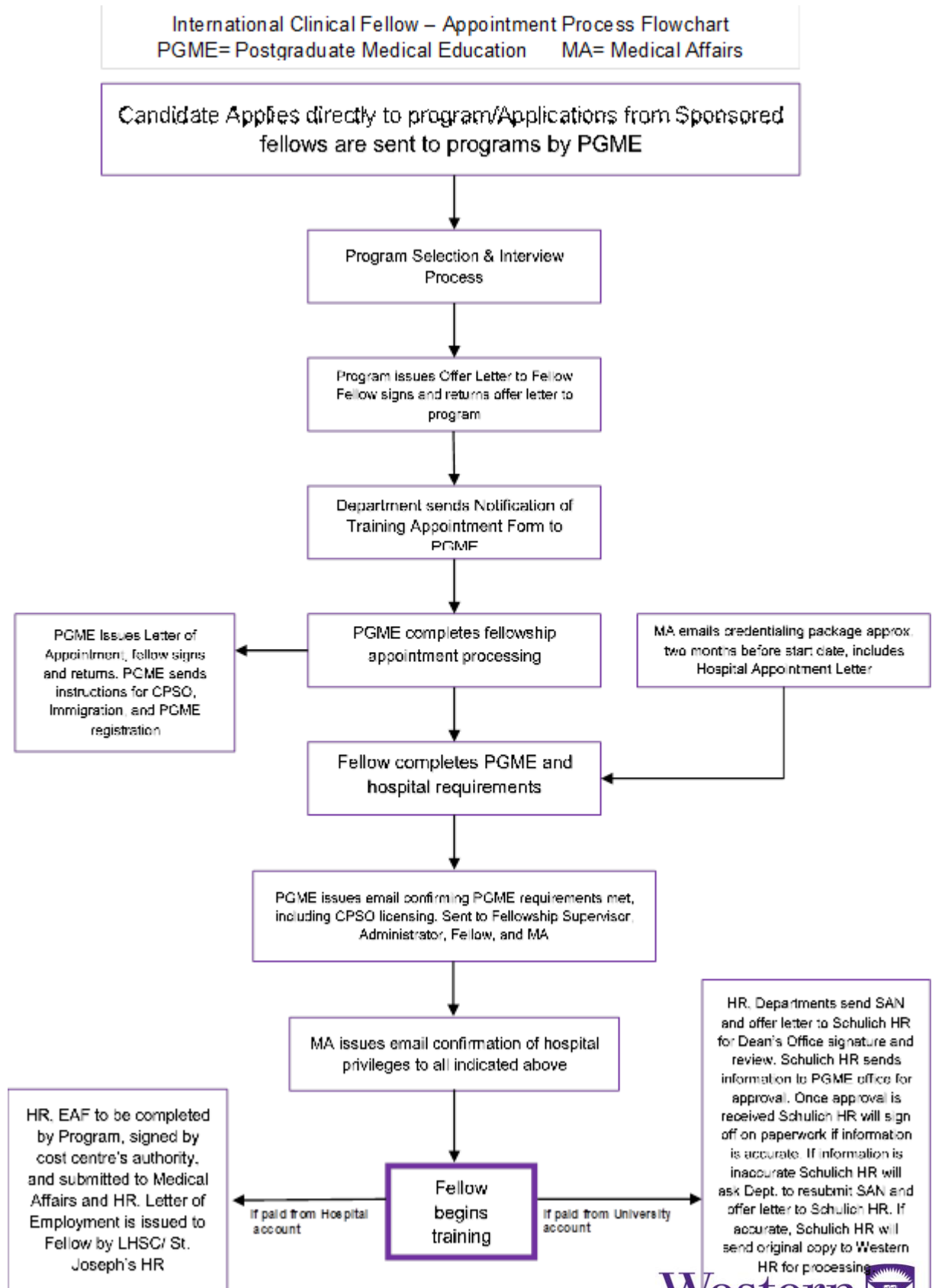


Table 1. Process description after a training appointment has been offered and accepted

Action	Timeline
Trainee signs and returns offer letter to PGME.	1 to 21 days
PGME confirms funding through sponsoring agency. No further action is taken until sponsoring agency confirms funding*.	Immediate upon receipt of signed offer letter or NOTA and all supporting documentation
Sponsoring agency returns confirmation of funding document to PGME*.	1 day to >4 months
PGME sends candidate letter of appointment (LOA – legal contract with Western University) along with welcome letter.	Immediate upon receipt of funding confirmation document
Candidate returns signed LOA back to PGME.	Ask for return within 21 days
PGME submits request for Letter of Eligibility to the College of Physicians and Surgeons of Ontario (CPSO)†.	Immediate upon receipt of the signed LOA
PGME receives Letter of Eligibility from CPSO, all eligibility requirements must be met (MCCEE, specialty certification etc.)‡.	5 – 15 business days
PGME prepares immigration documents and submits Offer of Employment and employer compliance fee to Immigration, Refugees and Citizenship Canada‡.	Within 1 – 5 business days of receipt of the LOE
PGME emails work permit documentation package and instructions to fellow, enabling them to apply for the required work permit‡.	Check processing time by country (3 weeks – 14 months)
Trainee must also apply for a Postgraduate Educational Certificate of Registration (license) through CPSO	Approx. 4 months
Trainee arrives at Canadian port-of-entry and work permit is printed by Customs officials, sends to PGME‡.	Immediate on arrival in Canada and clearing Customs
PGME verifies work permit and sends to CPSO‡.	Immediate upon receipt
Trainee cannot begin training until they have met all PGME and Medical Affairs (MA) requirements.	Instructions for meeting requirements are issued at least 4 weeks prior to start date
PGME and MA will issue email to both Program Director (PD) and Program Administrator (PA) once they have been verified.	
Trainee begins Pre-Entry Assessment Program (PEAP)‡. <ul style="list-style-type: none"> - The PEAP is an assessment process, 4 - 12 weeks in length that evaluates international medical graduates to determine whether they can function at the level of Ontario medical school graduates and are qualified to enter an Ontario training program. During the PEAP, the trainee is 	

assessed on their clinical skills, knowledge and judgment in the discipline. The overall purpose is to determine that the candidate is mentally competent to practice medicine, has the ability to practice with decency, integrity and honesty and in accordance with the law, has sufficient knowledge, skill and judgment to engage in the kind of medical practice authorized by the certificate, and can communicate effectively and displays an appropriately professional attitude.

- The program is responsible for completing a [PEAP evaluation form](#) to the PGME office no later than 7 days prior to the fellow's PEAP end date. If the evaluation determines the fellow has demonstrated appropriate ability during the PEAP, the fellow may continue in the program. If the fellow is unsuccessful during the PEAP, the CPSO terminates the certificate of registration and the appointment is terminated. There is an appeal policy available on procedural grounds only, more information is available in the [PGME PEAP policy](#).

*Applicable to internationally sponsored fellows only

†Applicable to international citizens only

‡Applicable to internationally-certified fellows with no previous postgraduate training in Canada or the USA.