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## PGME Resident Transfer Policy

<b>Office of Accountability:</b>	Faculty of Medicine & Dentistry (FoMD)
<b>Office of Administrative Responsibility:</b>	Postgraduate Medical Education (PGME)
<b>Approver:</b>	Postgraduate Medical Education Committee (PGEC)
<b>Classification:</b>	Governance and Administration
<b>Scope:</b>	Residency Training (Residents)

### Purpose

The Postgraduate Medical Education (PGME) Office allows for the possibility of granting a transfer request for Residents. Significant challenges can arise given the wide and varied circumstances that lead to residency transfer requests. It is recognized that a transfer to another residency program may be beneficial to the learner's health, wellbeing, academic success, and career goals. The purpose of this policy is to outline the principles behind granting a residency program transfer request.

This policy applies to Residents currently enrolled in a Postgraduate residency training program in Canada, subject to the criteria of the receiving provincial licensing jurisdiction(s) and the receiving University.

Supporting procedures of this policy should:

- a. Ensure that each transfer request will be managed in an objective, fair, and equitable manner in accordance with the principles of this policy.
- b. Outline the transfer request expectations for PGME, Residents, and Residency Programs.

## POLICY

### 1. PRINCIPLES

The following principles apply when considering a residency program transfer request:

- a. All parties involved in the transfer process will make every effort to regard each case with confidentiality, and information will only be relayed on a need-to-know basis.
- b. All transfers are at the discretion, and require the final approval, of the Associate Dean, PGME.
- c. The Associate Dean shall act in consultation with PGME's Director of Resident Transfers.
- d. Transfers are not a mechanism to subvert the Canadian Resident Matching System (CaRMS) match. Therefore, transfer requests will not be considered in the first six months of the academic year for first-year residents unless there are exceptional circumstances.
- e. Transfer requests will not be considered until a resident has completed a minimum of six months in the original discipline to which they matched.

- f. Transfer requests will not be considered in the final six months of the residency training program.
  - i. Following review by the PGME office to determine eligibility, and at the discretion of the Associate Dean, PGME, a transfer request within the last six months of a one-year residency program may be considered. In these cases, if approved, timing of the transfer will typically occur before completing the “donor” one-year residency program.
- g. Considering or exploring a transfer request in no way guarantees a successful transfer.
- h. Residents sponsored by agencies other than the Alberta Ministry of Health must provide documentation confirming that their sponsor agrees with the transfer request and will continue funding if the transfer is successful. A new funding letter of support from the sponsor may be required.

## **2. RESPONSIBILITIES OF THE PGME OFFICE**

- a. It is recognized that resident transfers can have a significant impact on relatively small residency programs. The Associate Dean will make every effort to ensure that an appropriate balance of positions within small programs is maintained. This rebalancing process may involve a variety of actions (e.g. appeal to the Quotas Committee, looking for one to one trades within the transfer pool, addition or removal of Postgraduate Year One (PGY-1) positions in the subsequent CaRMS match, etc.). Program Directors shall have the opportunity to provide input to the Quotas Committee and the Associate Dean regarding rebalancing issues.
- b. The Postgraduate Medical Education Office will collect and compile data on resident transfers on an annual basis.

## **3. RESPONSIBILITIES OF THE DIRECTOR OF RESIDENT TRANSFERS**

- a. The Director of Resident Transfers (Director) is advisory to the Associate Dean on matters relating to the transfer of residents between training programs.
- b. The Director shall:
  - i. Serve as a key advisor for residents, Residency Program Directors, and the Associate Dean in addressing transfer requests;
  - ii. Be responsible for assisting and advising the resident, related Residency Program Directors, and the Associate Dean with respect to adhering to the principles and supporting procedures of this policy; and
  - iii. Make every effort to ensure transfer requests are addressed with fairness, expediency, and confidentiality
  - iv. Work with the Director of Resident Transfers, or equivalent, in other Canadian postgraduate medical education offices as needed when handling national transfer requests.
- c. The Director may consult with the Associate Dean at any time during the transfer request procedure.
- d. The following shall govern any meeting with the Director as it relates to resident transfers:
  - i. The meeting should be confidential. The Director can choose to hear from individuals involved in the transfer request to provide information and to answer any questions the Director may have.
  - ii. After the meeting(s), the recommendations of the Director shall be sent in writing to the resident, the Residency Program Director, and the Associate Dean. All discussions with the Director will be considered privileged information and written records will be

considered strictly confidential.

#### 4. RESPONSIBILITIES OF THE RESIDENCY PROGRAMS

- a. No resident shall be subject to recrimination for initiating a resident transfer request.
- b. During and after the transfer process, every effort shall be made to ensure maximum credit for previous training as determined by either the certifying Colleges' assessment of training or the PGME Credit of Training Policy. Attempts will be made to ensure residents do not repeat training experiences completed successfully in previous training and transfer credit will be recommended by the program only after the resident has successfully completed six (6) months of training in the new program. This may or may not include a shortened training period.
- c. There should not be direct contact between donor and recipient program directors about a possible transfer request without the explicit consent of the resident.

#### DEFINITIONS

Definitions are listed in the sequence they occur in the document (i.e. not alphabetical).

Any definitions listed in the following table apply to this document only with no implied or intended institution-wide use.	
<b>Intra-University Transfer</b>	Intra-University Transfer means a Resident Physician transferring from one specialty to a different specialty within the University of Alberta.
<b>Inter-University Transfer</b>	Inter-University Transfer means a Resident Physician transferring residency training between the University of Alberta and the University of Calgary.
<b>External Transfer</b>	External Transfer means a Resident Physician transferring residency training between the University of Alberta and a university in another jurisdiction within Canada.