

DEPARTMENT OF PATHOLOGY & LABORATORY MEDICINE  
FELLOWSHIP & AREAS OF FOCUSED COMPETENCE (AFC)  
POLICIES & GUIDELINES

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## Section 1: Fellowship & AFC Programs

### *1.1 Introduction*

The Department of Pathology & Laboratory Medicine, University of Calgary, together with Calgary Laboratory Services (CLS), offers a unique opportunity for Fellowship and AFC training in a vibrant medical and cultural setting of Canada's "Heart of the New West" located in the foothills of the picturesque Rocky Mountains.

Our principal mission is to prepare trainees for careers in academic diagnostic pathology and laboratory medicine, using extensive clinical material and mentorship of the 90+ dedicated faculty members of our department. Our programs provide 1-2 years of intensive training in the subspecialty areas listed below. In addition to clinical expertise, trainees acquire a working knowledge of the theoretical basis of the specialty, including its foundations in the basic medical sciences. Opportunities for participation in collaborative clinical research are available and encouraged.

### *1.2 Programs Offered*

[BREAST PATHOLOGY PROGRAM](#)

[CLINICAL BIOCHEMISTRY PROGRAM](#)

[CYTOGENETICS PROGRAM](#)

[CYTOPATHOLOGY PROGRAM](#)

[DERMATOPATHOLOGY PROGRAM](#)

[GASTROINTESTINAL PATHOLOGY PROGRAM](#)

[GYNECOLOGIC PATHOLOGY PROGRAM](#)

[HEMATOPATHOLOGY PROGRAM](#)

[HISTOCOMPATIBILITY PROGRAM](#)

[PEDIATRIC PATHOLOGY PROGRAM](#)

[PULMONARY PATHOLOGY PROGRAM](#)

[RENAL-TRANSPLANTATION PATHOLOGY PROGRAM](#)

[UROPATHOLOGY PROGRAM](#)

OTHERS AS THEY DEVELOP

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## Section 2: Administrative Structure

The Department of Pathology & Laboratory Medicine has delegated the authority and responsibility for the operation of the Fellowship and AFC programs to two levels of committees: a single Departmental Fellowship & AFC Training Committee providing oversight, and the individual Program Committees (the number of which will vary depending on the number of programs).

### *2.1 Departmental Fellowship & AFC Training Committee Terms of Reference*

#### 2.1.1 Definition and Purpose

The Department of Pathology & Laboratory Medicine/Calgary Laboratory Services (DPLM/CLS) Fellowship & AFC Training Committee is a standing committee within the Department. The purpose of the committee is to provide leadership and overall management and support for Fellowship and AFC training in subspecialty areas of pathology and laboratory medicine.

#### 2.1.2 Membership of the Departmental Fellowship & AFC Training Committee

Chair appointed by the Department Head with input from the committee.

Residency Training Program Director or Co-Director for Anatomical Pathology

Residency Training Program Director or Co-Director for General Pathology

Two Members-at-Large, selected by the committee from among department members (excluding Fellowship and AFC Program Directors) who respond to a request from the Chair, for an expression of interest in serving on the committee. This request is circulated to all department members. Normally these members serve for a 2-year term (with the option of renewal). At least one member will be a PhD clinical scientist.

Department Head (Ex-Officio)

#### 2.1.3 Responsibilities

The Committee is responsible for:

- a. Approval of Fellowship programs and AFC program applications
- b. Developing priorities for trainee recruitment
- c. Developing and monitoring the process for advertising available positions
- d. Developing selection criteria and a selection process for applicants
- e. Reviewing all applications for candidates recommended by programs. (Note: applicant review is delegated to individual programs in the case of any hard-funded positions.)

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- f. Final selection of trainees ranked by the programs, whether internally or externally funded, taking into account the relative strength of applications, available funding, and program variables. Where candidates are seen to be equally qualified, priority will be given to AFC program applicants.
- g. Monitoring and reviewing trainee and program outcomes
- h. Advocating for educational resources for trainees
- i. Meeting with trainees once per year to receive suggestions and input on program quality
- j. Meeting with Fellowship and AFC Program Directors once per year, preferably at the next scheduled meeting after the meeting with trainees
- k. Monitoring the assessment process for trainees
- l. Monitoring and responding appropriately to the evaluations of the individual programs
- m. Monitoring and responding to Royal College and PGME Office activities related to AFC programs
- n. Advising and assisting Fellowship and AFC Program Directors in the performance of their duties

**2.1.4 Meetings of the Departmental Fellowship & AFC Training Committee**

The committee will normally meet monthly during the academic year. Special meetings may be held at the call of the Chair.

**2.1.5 Accountability**

The committee will report activities and outcomes to the Department Head - Department of Pathology & Laboratory Medicine and to the Executive, CLS.

**2.1.6 Terms of Reference**

The committee will review the Terms of Reference at least annually.

**2.1.7 Resources**

Administrative support is provided by CLS.

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## ***2.2 Individual Fellowship & AFC Program Committees Terms of Reference***

### **2.2.1 Definition and Purpose**

These committees are subcommittees of the DPLM/CLS Fellowship & AFC Training Committee. The purpose of these committees is to provide leadership and management for individual Fellowship and AFC programs in subspecialty areas of pathology and laboratory medicine.

### **2.2.2 Membership of Individual Fellowship & AFC Program Committees**

The Fellowship or AFC Program Director is nominated by the Clinical Section sponsoring the program but must be appointed by the DPLM/CLS Fellowship & AFC Training Committee. The Program Director will also Chair the individual Fellowship or AFC Program Committee. Where more than one suitable faculty member is available for this role, appointment of a Fellowship or AFC Program Co-Director and/or the imposition of term limits are recommended.

At least two additional members nominated from the sponsoring Clinical Section and confirmed by the DPLM/CLS Fellowship & AFC Training Committee. Normally these members would serve for a 3-year term (with the option of a second term) and include a member from the site where the majority of rotations take place.

### **2.2.3 Responsibilities of Individual Fellowship & AFC Program Committees are as follows:**

- a. Providing leadership including development and yearly updating of the details of the educational program using the template that has been developed by the DPLM/CLS Fellowship & AFC Training Committee.
- b. Reviewing all applicants (both internally and externally funded) for the program and ranking acceptable candidate(s) for appointment to the program.
- c. Forwarding a ranked list of acceptable candidates to the DPLM/CLS Fellowship & AFC Training Committee, which makes the final selection of trainees for the Department.
- d. Ensuring that resources and infrastructure are in place to provide the training.
- e. Liaising with the Residency Program Committees and other Clinical Sections that may be impacted by the appointment and obtaining their agreement that they have the resources to provide the training. Collaborating with Residency Program Directors to provide optimal learning opportunities for all learners.
- g. Ensuring formal assessments of each trainee take place at regular intervals.

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- h. Conducting exit interviews with trainees on completion of the program.
- i. Collecting electronic anonymous program evaluations (including preceptors, rotations, educational assignments, and the overall program) at 3, 6, and 12 months (plus 18 and 24 months in the case of 2-year programs.) These will be forwarded to the Chair of the DPLM/CLS Departmental Fellowship & AFC Committee identified only by program. The Chair will disperse collated, de-identified copies to the Departmental Fellowship & AFC Committee members for discussion annually, or earlier in the case of any findings considered to be urgent by the Chair.
- j. To report regularly on trainees' educational activities and the program at Clinical Section meetings.

#### **2.2.4 Meetings of Individual Fellowship & AFC Program Committees**

- a. Committees will meet at least quarterly whenever a trainee is enrolled or matched to the program.
- b. Special meetings may be held at the call of the Program Director.
- c. Committee deliberations must be minuted and copies of the minutes must be made available to the Department Head's office for review upon the request of the Chair of DPLM/CLS Fellowship & AFC Training Committee .
- d. Trainee issues must be a standing agenda item.
- e. Trainees must be invited to attend meetings at least once per year.

#### **2.2.5 Accountability**

The individual program committees are governed by and will report activities and outcomes to the DPLM/CLS Fellowship & AFC Training Committee.

AFC Program Directors have a dual reporting responsibility to the DPLM/CLS Fellowship & AFC Committee and to the Associate Dean Postgraduate Medical Education, University of Calgary or his/her designate.

## **Section 3: Educational Opportunities**

### ***3:1 Introduction***

The overarching objective of all Fellowship and AFC programs is to provide additional training in pathology subspecialties. During their fellowship/AFC trainees may be expected to deliver clinical service, however, trainees are not appointed to meet service needs. Preference is given to recent graduates of Canadian pathology residency training programs or Ph.D. programs. Applications will be considered from the following groups

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- a. Medical doctors who are board certified or board eligible in a pathology discipline from either the Royal College of Physicians and Surgeons of Canada or the American Board of Pathology
- b. Ph.D. holders who are pursuing additional formal laboratory training related to their doctorate
- c. International medical graduates who hold pathology appointments in international institutions and who will have their Fellowship/AFC fully funded by that institution.

Applications from individuals who do not meet one or these criteria will not typically be considered. However, under exceptional circumstances, such applications may be discussed on a case-by-case basis at the discretion of the Fellowship & AFC Fellowship Training Committee

Fellowship Programs will also consider applications from international graduates who hold pathology appointments in international institutions and who will have their Fellowship funded by that institution. Applications to Fellowships or AFC programs from individuals who are not Canadian citizens or permanent residents of Canada and who do not have external funding, will not normally be considered.

### ***3:2 Program Information***

Details of the educational programs can be accessed by consulting the DPLM/CLS website.

### ***3.3 Continuing Medical Education Participation***

In order to encourage trainees to actively participate in the Department's continuing education each fellow is required to provide one (1) CME presentation during the academic year. The booking of the presentation is to be coordinated through the Continuing Medical Education Grand Rounds Coordinator.

### ***3.4 Mentorship***

Fellowship and AFC training is an essential dimension of the transformation of medical and clinical scientist trainees to independent practitioners along the continuum of medical education. It is physically, emotionally, and intellectually demanding, and requires longitudinally-concentrated effort on the part of trainees.

The specialty education of laboratory physicians and scientists to practice independently is highly experiential, and necessarily occurs within the context of the health care delivery system. For the trainee, the essential learning activity is interaction with patient derived specimens under the guidance and supervision of faculty members who give value, context, and meaning to those interactions.

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In addition to direct supervision, trainees often informally choose a faculty member as a mentor who is available, at the trainee's initiation, to discuss career development and professional matters. Mentorship within each individual program is encouraged, but not mandatory. Some trainees will choose to have more than one mentor; each assisting with different aspects of professional development.

The mentor is encouraged to:

- Allow the trainee to observe managerial, medical leadership, governance and/or policy processes in practice, and facilitate discussion and growth in these areas
- Provide suggestions regarding research opportunities relevant to the trainee's career development goals
- Provide networking contacts
- Discuss career paths
- Discuss further training and/or job opportunities

Frequency of contact will be negotiated between the trainee and the mentor; some contact at least once every quarter is recommended. The duration of mentorship will normally be from initiation to the end of training; however, the mentor or the trainee can terminate the relationship at any time with appropriate notice to the other party.

### ***3.5 Assessment***

#### **3.5.1 Trainee Assessment**

The overarching objective for assessments is to assure the trainee, the program, and the DPLM/CLS Fellowship & AFC Training Committee that the objectives of the program are being met and that the trainee will be considered competent to function as an expert in the particular subspecialty area upon completion of the program.

Faculty must formally assess trainee performance during each rotation or educational assignment, and document this evaluation at regular intervals, that allow the trainee to be aware of deficiencies in a timely manner and provide sufficient time for demonstration of improvement. The respective Fellowship or AFC program must provide objective assessments of competence in patient care, medical/scientific knowledge, practice-based learning and improvement, interpersonal and communication skills, professionalism, and systems-based practice using multiple evaluators (e.g., faculty, peers, self, and other professional staff) and document progressive performance improvement appropriate to the educational level of a fellow or AFC diplomate. Each program will develop its own methods for assessment and remediation, using this document and postgraduate educational principles as a guide.



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The program must provide each trainee with documented quarterly (at a minimum) evaluations of performance including face-to-face feedback. Immediate, informal feedback should be given more frequently; in some cases daily. The Fellowship or AFC Program Director must provide a summative assessment for each trainee upon completion of the program. This assessment must document the trainee's performance during the final period of education, and verify that the trainee has demonstrated sufficient competence to enter practice without direct supervision. All assessments are considered part of the trainee's permanent record maintained by the department and must be accessible for review upon request by the trainee and/or the DPLM/CLS Fellowship & AFC Committee.

While most trainees will complete their program without difficulty, some will not, and may require minor modification of their training. Our programs are not designed to provide extensions to training, therefore it is essential that performance deficiencies be identified and communicated to the trainee early, with any remedial requirements inserted into the time available, including evenings and weekends (but not vacation time). Unsatisfactory or marginal performance that is not amenable to remediation during the contracted time, may lead to termination from the program.

Assessment of trainees in AFC and other externally accredited programs must also be in compliance with the relevant accreditation standards.

### **3.5.2 Program Evaluation**

Trainees must have the opportunity to evaluate their supervising faculty members and the various components of their Fellowship or AFC program at least annually at an exit interview; and by using electronic anonymous program evaluation forms at 3, 6, and 12 months (plus 18 and 24 months in the case of 2-year programs). The program must use the results of trainee assessments of the program together with other indicators to undertake continuous program quality improvement.

If major deficiencies are present, the individual Fellowship or AFC Program Committee should prepare a written plan of action to document and track initiatives for improvement. The action plan should be reviewed and approved by the Program Committee and documented in meeting minutes. Outcomes of the action plan should be formally re-evaluated within a year. The DPLM/CLS Fellowship & AFC Training Committee should be kept informed of major deficiencies and initiatives. The Chair of the DPLM/CLS Fellowship & AFC Training Committee may require a Program Director to attend a meeting for this purpose.

Program evaluation of AFC and other externally accredited programs must also be in compliance with the relevant accreditation standards.

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### ***3.6 Trainee Concerns***

Trainee issues must be a standing agenda item for individual Fellowship or AFC Program Committee meetings. Trainees must be invited to attend individual Fellowship or AFC Program Committee meetings at least once per year. Trainees are also invited to attend a DPLM/CLS Fellowship & AFC Committee meeting once a year to discuss progress of their training and program quality as a group.

Although trainees are strongly encouraged to take concerns about their program to the Program Director first, any trainee concerns that cannot be addressed in that manner can be brought to the DPLM/CLS Fellowship & AFC Committee at any time during the academic year; trainee concerns are a permanent standing item of the DPLM/CLS Fellowship & AFC Committee agenda.

## **Section 4: Research**

### ***4.1 Introduction***

The trainee's role in research varies from program to program. As most programs are only 12 months in duration, and as the primary focus is to become expert clinicians within the subspecialty, formal time devoted to research may be limited. Individual program objectives should be consulted for the role of research in each program. If research is a mandatory component of the program then a block of time will be assigned to devote to research.

To undertake a research project requires a number of steps.

1. Develop a clear statement of the research question.
2. Do a literature review.
3. Develop the research method.
4. Outline a budget.
5. Develop timelines.
6. Present your project to your individual Fellowship or AFC Program Committee for approval.
7. Submit for ethics approval.
8. Carry out the research after obtaining ethics approval

Obviously to follow all these steps will take considerable time and effort. To realistically accomplish the research, steps 1 – 7 need to be completed no later than the end of month 3 of the 12-month

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program. Ideally the trainee would begin working on Steps 1-5, in conjunction with their Program Director, as soon as the trainee accepts the appointment and before the formal program begins.

### **Types of Research Projects**

1. Clinical based project using archival and/or prospective case material
2. Methods development
3. Research designed to address issues of quality assurance
4. Experimental research

## **Section 5: Policies and Procedures**

### ***5.1 Vacation***

Vacation allowance is four weeks per academic year.

The general rule is that no more than two weeks of vacation may be taken during any one rotation. Vacation leave should be requested well before schedules go out. Each program may set its own reasonable deadlines for various scheduling requests. Approval of vacation time requires the signature of the Fellowship or AFC Program Director. The program administrator will track the accumulated vacation time for each trainee.

### ***5.2 Leaves of Absence***

The Office of Postgraduate Medical Education and CLS policies related to leaves of absence are followed. A leave of absence may be granted at any time at the discretion of the Fellowship or AFC Program Director. Trainees are not required to divulge details regarding emergency or personal situations to anyone other than their Program Director.

### ***5.3 Conference/Education Leave and Funding***

**5.3.1** Trainees will be allowed up to one week (i.e. 5 working days) of conference/educational leave per academic year (July 1st – June 30th). Any additional time taken will be considered vacation time.

#### **5.3.2 CLS Funding**

A trainee giving a poster or platform presentation at a North American conference may be eligible for funding for one meeting per year providing the following conditions are met:

- a) The trainee must be the first author (case reports are excluded).

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- b) The project/study must be original work.
- c) The trainee is responsible for requesting pre-approval of funding (through their Program Director) normally at least 6 weeks prior to the meeting. Trainees attending conferences are also accountable to the CLS Policy III 3.500 – Travel, Hospitality and Hosting.
- d) The Program Director must confirm approval for the funding from the DPLM/CLS Fellowship & AFC Committee administrator.
- e) Funding is dependent on availability of funds, which is determined on an annual basis. From year to year, CLS funding may be available for other educational purposes. Program Directors should consult with the DPLM/CLS Fellowship & AFC Committee administrator for availability and deadlines.

### **5.3.3 Special Circumstances**

If a special circumstance arises (e.g. an opportunity to present at more than one conference per year, or to present at a non-North American international conference, etc.), the matter can be brought forward to the DPLM/CLS Fellowship & AFC Committee for consideration.

If a trainee chooses to travel without first receiving approval from the Program Director, he/she will not be eligible for reimbursement.

Externally funded trainees should consult their contract regarding the availability of conference funding.

### **5.3.4 Procedure for Applying For Conference Leave, Leave Of Absence, & Vacation**

For **INTERNALLY** funded trainees (i.e. paid by CLS and have a CLS employee number):

- a) The trainee will fill out the Fellowship Leave Request Form available from the Program Director's administrative assistant.
- b) The Fellowship or AFC Program Director will approve or deny the request.
- c) The approved or denied request will then be given to the individual Program Director's administrative assistant.
- d) The individual program administrative assistant will report the time changes to CLS Centralized Timekeeping (Centralized.Timekeeping@.cls.ab.ca) using the format provided below:

Fellowship Trainee Name (first and last)

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EE# - (four digit employee number)

Date in long form (i.e. November 1, 2013)

Please change time to read: (CME, Vacation, Personal Leave, etc.)

- e) The individual program administrative assistant provides a PDF copy of the approved request to the requestor.
- f) The PDF copy of the request form will be saved in the trainee's file on the secure network. The original hard copy will be kept in a locked file cabinet.

For **EXTERNALLY** funded trainees (i.e. paid by their sponsor or country of origin) the same procedure except for step d) is followed and the availability and approval of funds is determined by the training contract.

#### ***5.4 Unscheduled Termination by Trainee***

Trainees leaving their Fellowship or AFC program before the contracted completion date must submit to their Program Director a letter stating their intention. If possible, at least one month's notice should be given. A documented exit interview should be conducted by the Program Director. A University of Calgary-sealed Certificate of Training will not be issued to any trainee who does not fulfill all program requirements, including attendance to the contracted completion date. The Program Director, at his or her discretion may only provide the trainee with a letter stating the dates of attendance and areas that were completed successfully.

**NB: REQUIRED RETENTION OF RECORDS IS 40 YEARS AS PER POSTGRADUATE MEDICAL EDUCATION AT THE UNIVERSITY OF CALGARY. THE SAME POLICY IS TO BE FOLLOWED FOR THE PhD TRAINEES.**



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