



<b>Authorizing Unit</b> Undergraduate Medical Education Management	<b>Table of Contents</b> 1. Purpose 1 2. Scope 2 3. Definitions 2 4. Background 2 5. Special Situations 2 6. Responsibilities 2 7. Process 3 8. Instructions / Forms 3 9. Standards 4 10. History 4
<b>Classification</b> Operations	
<b>Approval Authority</b> Associate Dean, Undergraduate Medical Education	
<b>Implementation Authority</b> Finance Manager, Undergraduate Medical Education	
<b>Effective Date</b> March 17, 2015	
<b>Last Revision</b> February 1, 2021	

**1. Purpose**

1.1 Create a policy for the use of Undergraduate Medical Education funds for the mandatory clerkship programs. Undergraduate Medical Education recognizes the value which mandatory clerkship departments bring to the teaching of medical doctor students in their clerkship year.

The purpose of this policy is to:

- a) Establish the process by which data on each preceptor will be collected and circulated;
- b) Establish the process by which funds will be distributed;
- c) Ensure that the funds are used appropriately and similarly to all other mandatory clerkship departments; and
- d) Ensure that information regarding this policy and funds are communicated to all mandatory clerkship departments in a timely manner.

The budget for all mandatory clerkship departments are calculated by using a formula. This is detailed in Section 9 - Standards.

## 2. Scope

2.1 This policy applies to all eight mandatory clerkship departments, their preceptors, and clerkship leaders.

## 3. Definitions

3.1 In this policy:

- a) "AMHSP" refers to the Academic Medicine and Health Services Program.
- b) "Approval Authority" means the office or officer responsible for approving Undergraduate Medical Education policies and procedures.
- c) "CACMS" refers to the Committee on Accreditation of Canadian Medical Schools.
- d) "Clerk" means a third-year medical student enrolled in the medical doctor program with the University of Calgary.
- e) "FTA" refers to a Full-Time faculty employee with the University of Calgary (also known as GFT).
- f) "Implementing Authority" means the office and officer responsible for implementing Undergraduate Medical Education policies and procedures.
- g) "Mandatory clerkship departments" are:
  - i) Department of Anesthesia
  - ii) Department of Family Medicine
  - iii) Department of Medicine
  - iv) Department of Paediatrics
  - v) Department of Psychiatry
  - vi) Department of Emergency Medicine
  - vii) Department of Obstetrics and Gynecology
  - viii) Department of Surgery
- h) "Preceptor" means an UME educator.
- i) "UME" means Undergraduate Medical Education.

## 4. Background

4.1 Ensure compliance with CACMS standard for accreditation element 9.2 - Faculty Appointments: "A medical school ensures that supervision of medical students is provided throughout required clinical learning experiences by members of the medical school's faculty."

4.2 Preceptors are required to hold a clinical or academic faculty appointment. Prior to involvement in a mandatory clerkship rotation, preceptors must provide documentation of application for University of Calgary faculty appointments. Fee-for-service preceptors must have a faculty appointment as part of their payment eligibility.

## 5. Special Situations

5.1 Special situations will be brought to the attention of UME Management.

## 6. Responsibilities

6.1 *Approval Authority: Associate Dean, UME* - ensures appropriate rigor and due diligence in the development or revision of this policy.

6.2 *Implementation Authority: Finance Manager, UME* - ensures that University staff and the mandatory clerkship departments are aware of and understand the implications of this policy and related procedures and processes. Monitors compliance with the policy and related procedures and processes. Regularly reviews the policy and related procedures and processes to ensure consistency in practice. Regularly provides financial reports to the mandatory clerkship departments and monitors the department's expenses. Sponsors the revision of this policy and related procedures and processes when necessary.

## 7. Process

7.1 The Finance Manager, UME will notify all mandatory clerkship departments of their budget for the upcoming fiscal year in May or June. This will be sent in an email to the Department Head and others identified at least quarterly. The Finance Manager will send an email to the Department Head and others identified as "need to know" regarding the financial status and account balance.

The UME Program Coordinators will assist the Clerkship Directors in providing the necessary information regarding the preceptors and the hours of teaching.

The Clerkship Director and the Department Head will review the budget and allocate the payments to each preceptor. Payment for teaching is to be the primary use of mandatory clerkship funds. Payment for eligible preceptors will be made by the UME Finance team to individual preceptors. Lump-sum payments to individual departments will not be made.

## 8. Instructions / Forms

8.1 Funds are to be used for the enhancement of the UME Clerkship Program. UME has approved the following uses of the mandatory clerkship budget:

- a) Payment of Fee-for-Service (FFS) Physicians;
- b) Faculty Development – specific information must be provided to the UME Finance Manager for approval;
- c) No payments will be allowed for FTA (GFT) or AMHSP physicians except for those physicians where their individual AMHSP agreement meets payment eligibility (e.g. 100% clinical);
- d) Materials and supplies required for clerkship teaching, e.g. books, teaching materials, manuals, task trainers/simulators specific for the education of Clerks. All supplies will be housed and are the responsibility of the UME;
- e) Membership dues related only to medical education, e.g. Academic Alliances in Medical Education (AAME); Canadian

Association for Medical Education (CAME); and Medical Student Educators in Psychiatry (ADMSEP), etc. require approval from the UME Finance Manager;

- f) Clerkship meeting expenses, e.g. catering;
- g) Travel and registration for conferences as it pertains to Clerkship teaching. A maximum amount of \$5,000.00 can be used for this purpose;
- h) Clerkship printing charges;
- i) Freight expenses as it pertains to supply purchases; and
- j) Special projects that have approval of the Associate Dean, UME.

**9. Standards**

9.1 The standard calculation is used for all mandatory clerkship departments in determining funding. Please note departments are to communicate accurate educator information. The following table is an example of this calculation:

Department of _____ Mandatory Clerkship 2020-21	
Number of Students (171 less 20 UCLIC)	151
Number of weeks in rotation	2
x \$250 / week	
x Fee for Service Percentage rate of 96%	
<b>Budget for 2020-21</b>	<b>\$ 72,480</b>

**10. History**

**Approved:** UME Management – June 17, 2020