

# **CLINICAL APPOINTMENTS**

## **2018 POLICY CHANGES**

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# APM Policies

- 278 and 210-6      HS Clinical Series
- 279                      Volunteer Clinical Professor
- 350                      Clinical Associate

# Why were the policies revised?

- To clarify the criteria for appointment and promotion in the Health Sciences Clinical Series
- To differentiate faculty and non-faculty titles
- Volunteer Clinical Professor series: To identify responsibilities and specify the terms of appointment/reappointment. Note that this title can now be used for UCSF-employed staff physicians who work at core UCSF sites.
- Clinical Associates: To define the use of a non-faculty academic title for clinical practitioners who are employed at locations affiliated with UCSF, including satellites and health system networks, but do not have teaching responsibilities

# HS Clinical Professor Series–APM 278

## Physicians

Definition: Faculty who have responsibilities in clinical care, teaching, scholarly/creative activities, and university and public service

- May be paid by UC or by an affiliated site, e.g. VA, ZSFG, Fresno
  - *Appointees at formal affiliates must hold an HS Clinical series appointment WITH A STEP, regardless of whether they are paid by UC*
- Staff physicians may hold a *without salary* HS Clinical faculty appointment (no steps) or a Volunteer Clinical Professor appointment
- HS Clinical appointees are faculty members in a non-Senate series

# **HS Clinical Professor Series-APM 278**

## **Non-physician clinicians**

- No new policy changes
- In the HS Clinical Series, search/waiver and step assignment are required if the clinician is paid by UCSF or a formal affiliate

# Policy changes for HS Clinical series

- APM 278-4: “Health Sciences Clinical Professor series faculty engage in scholarly or creative activities which derive from and support their primary responsibilities in clinical teaching and professional and service activities.”
- The definition of creative and scholarly activities for the HS Clinical series is very broadly defined.
- We anticipate that faculty members who currently meet the expectations in the HS Clinical series will continue to meet the revised expectations.
- **What are the implications?**
- Scholarly/creative activity is required, not optional
- Assessment of reputation (regional/national/international) is no longer required

# Examples of scholarly/creative activities for HS Clinical Series (APM 210-6)

- Development of or contributions to administration of a teaching program or a clinical service
- Development of or contributions to quality improvement programs, community-oriented programs, community outreach
- Participation in platform or poster presentations
- Participation in research
- Publication of case reports or clinical reviews

# Chair's letter for HS Clinical Series faculty members

The screenshot shows a web browser window with a form titled "Research and/or Creative Activities". A yellow circle highlights the title. The form contains a table with five columns: "Not Applicable", "Needs Improvement", "Favorable", and "Outstanding". The rows include "Productivity", "Independence", "Significance of research", "Collaborative research (not a requirement)", "Peer-reviewed research support", and "Overall". Each row has radio buttons in the "Not Applicable" column. Below the table is a text box for "Comments on Research and/or Creative Activities (required as applicable to series)" with the text "The primary focus of this appointment will be clinical." Below this is another section titled "Professional Competence" with a similar table structure.

	Not Applicable	Needs Improvement	Favorable	Outstanding
Productivity	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Independence	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Significance of research	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Collaborative research (not a requirement)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Peer-reviewed research support	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overall	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments on Research and/or Creative Activities (required as applicable to series)  
The primary focus of this appointment will be clinical.

	Not Applicable	Needs Improvement	Favorable	Outstanding
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# HS Clinical Series – Transition Phase

What if the Chair/department is concerned that an HS Clinical Series faculty member does not meet the criterion for scholarly/creative work?

- We believe that faculty members who currently meet the expectations in the HS Clinical series will continue to meet the expectations under the revised policy. For example, QI leadership, creating curricula, modifying clinical workflows or educational innovations
- If there are concerns, please reach out to the Academic Affairs office to discuss the faculty member's activities and contributions

# What about Clinical X?

APM 275 (Clinical X) did not change

Clinical X faculty members must be involved in  
scholarly/creative work and  
must *disseminate* their work outside UCSF

# Volunteer Clinical Professor Series (VCP)

## APM 279

Definition: Community volunteer clinicians who have limited teaching responsibilities. They are valuable contributors to the teaching mission and are assessed on the basis of clinical competence and excellence in teaching.

Scholarly/creative activities and University/Public Service are NOT required.

- **NEW:** An individual who is employed by the University as a staff physician or clinician and has teaching responsibilities may hold a concurrent VCP appointment. *In the past, the concurrent appointment was limited to HS Clinical.*
- Two titles: Volunteer Clinical Instructor and Volunteer Clinical Professor (Assistant/Associate/Full)
- The Volunteer Clinical Professor title is considered a teaching title and does not have the obligations or the benefits of a faculty title.

# Process changes for Volunteer Clinical Professor series

- Advance has been updated to track reappointments and promotions according to the new policy
- Advance handles the new attestation form
- The Chair's letter evaluates two categories: teaching and professional competence
- Advance allows VCP to track their teaching activities
- **Approval authority: Delegated to the Department Chair in the SOM**

# VCP Series – Timing and Reminders

- Advance system will send notifications to appointees to complete their attestation forms
- If the attestation form is not completed, the appointment will be terminated and cannot be renewed
- The Department Chair, appointee, and shared services contact will receive notification of termination
- Notification/reminder schedule
  - Request for materials                      42 days
  - Reminder    14 days
  - Final reminder                                      2 days
  - Notification of termination
- Termination notification

“Your UCSF Volunteer Clinical Professor appointment was ended because you did not submit the required attestation form by the deadline. If you believe your UCSF Volunteer Clinical Professor appointment was ended in error, please contact your UCSF Department Chair to request to have your appointment reinstated. If you have questions, please contact your HR academic generalist. This email is system generated and does not accept replies.”

# VCP Series – Timing And Transfers

- When do we start the new process?
  - Existing appointments: upon renewal of appointment or promotion action (whichever comes first)
  - New appointments: 7/1/18 or later
- What about transfers to other series?
  - Volunteer Clinical Professor → Clinical Associate
    - May be done via memo through 12/31/18
    - Beginning 1/1/19, transfer to Clinical Associate or another University title requires academic review
  - Volunteer Clinical Professor → any other series
    - Requires a packet and may require search/search waiver

# Clinical Associate

## APM 350

Definition: Clinicians who contribute to the clinical mission using their expertise, knowledge and perspectives but have no teaching or research obligations to UCSF

- Must be employed at locations affiliated with UCSF, but not core UCSF clinical sites.
- *A without salary* appointment does not constitute employment by UCSF
- The title is a non-faculty academic title
- **Approval authority: Delegated to the Department Chair in the SOM**

# Clinical Associate – Implementation at UCSF

- When will we start the new process for Clinical Associates?
  - Existing appointments: upon renewal of appointment
  - New appointments: 7/1/18
- What are the terms of appointment?
  - Appointment/ Reappointment: 5 years maximum
  - Appointments expire:
    - on end date; or
    - when the individual no longer practices at the UCSF-affiliated facility; or
    - when the affiliation agreement ends between the University and the UCSF-affiliated facility



# Clinical Associate

## Process for Appointment / Reappointment

What is the new process?

### Advance Packets

- Clinical Associate Verification form (VPAA Academic Affairs website), completed and signed by the academic home department and the UCSF Medical Staff Office\*;
- CV required for new appointments– NOT for reappointment
- Chair's letter requires certification only, no text

\* Initial / current practice, please call OVPAA if there are questions

# SUMMARY

- HS Clinical packets:
  - Need to address the faculty member's creative work
  - Do not need to address the faculty member's regional/national reputation
- VCP appointees may be traditional teachers from the community OR UCSF staff physicians / clinicians with modest teaching responsibilities
- Clinical Associates will be physicians at UCSF's non-core sites who have no (or incidental) teaching responsibilities

Resources available on the Vice Provost's  
ACADEMIC AFFAIRS WEBSITE  
<http://academicaffairs.ucsf.edu/>

- Dossier checklists
- Reference sheet
- CAP Guidance and examples for HS Clinical Series
- Forms
- ADVANCE quick guides

QUESTIONS?

Suggestions for future presentations?