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Section A: Introduction

A1: Purpose

McMaster's Postgraduate Medical Education (PGME) office will facilitate and support residents who wish to transfer residency programs during their training.

The purpose of this policy is to outline the transfer process for McMaster residents who wish to transfer internally within McMaster or externally to another Canadian training program. The PGME office will ensure access to the transfer policy and its processes and facilitate transfers according to the timeline outlined in [Appendix 1](#). The PGME office will respond to questions or concerns about transfers, the application process, and procedures outlined in the policy.

A2: Scope

This policy applies to all residents who are registered with the PGME office at McMaster University. All residents external to McMaster must apply for transfer consideration through their home institution.

Externally sponsored residents interested in a transfer must be pre-approved by their sponsor to transfer. They will follow the same policy and process indicated below (timelines outlined in this document may not be applicable).

Section B: General Principles

1. All residents are entitled to fair and equitable consideration for transfer requests.
2. Program capacity and institutional funding may limit the availability of program transfers from year to year.
3. PGME will not share the application package nor information about the applicant's intent to transfer with the program director or staff of the home program. Communication with the home program will occur only if the resident has been accepted to another program and agrees to the transfer offer. The resident will be notified before any communication with the home program director.
4. Internal transfer requests are prioritized over national transfer requests from residents registered at other institutions interested in transferring to a McMaster residency program.
5. Transfers within the last six months of a program will not be considered, except in cases in which the programs significantly overlap (e.g., Family Medicine to Public Health and Preventive Medicine) or exceptional circumstances (determined on a case-by-case basis).
 - Residents who have been admitted through re-entry or repatriation pathways will not be considered for a transfer.
 - Residents enrolled in subspecialty training who are certified or eligible for certification in the primary specialty will not be considered for transfer to another primary specialty.

6. Transfers should not subvert the CaRMS match. PGY1 transfers and PGY4 transfers after subspecialty matches will be considered after the resident has completed 6 months in the home program.
7. Residents are encouraged to utilize the second iteration of CaRMS as a potential route to change programs, particularly for requests to transfer to programs at another institution.
8. All transfers should ideally optimize the supply and distribution of physicians in Ontario to meet provincial and/or societal needs that facilitate access to healthcare for all Ontarians.
9. Transfers should not significantly alter the distribution of residency position allocation across schools and within disciplines.
10. Transfer requests to programs who have been assigned a *Notice of Intent to Withdraw Accreditation* during the accreditation process will not be considered unless exceptional circumstances.
11. Each transfer request will be considered on its own merit; however, priority will be given to transfers based on wrong career choice or demonstrated transfer need such as disability or health issues that prevent residents from completing their original program, etc.
12. Residents should have clinical exposure to the discipline to which they are requesting a transfer (either during medical school or residency training).
13. Funding is not transferable between institutions, and therefore universities considering/accepting the transfer of a McMaster resident must have funding to support the transfer.
14. Applicants should be of similar quality to successful candidates through the CaRMS match in the receiving program, and the program must use similar selection methods when considering transfer applicants.
15. A program will not normally be expected to accept a resident who does not meet the program's selection criteria.
16. Start dates outside of the normal transfer process (January 1, July 1) must be agreed upon by the home and receiving program. PGME will not participate in this negotiation.

Section C: Transfer Process

C1: Internal Transfer Process

17. Residents who would like to discuss the transfer process are encouraged to contact: [Postgraduate Manager \(PGME\)](#), [Associate Dean, PGME](#), [Assistant Dean, Resident Affairs](#) and/or [the Program Director](#) of the program they wish to transfer to.
18. Residents are encouraged to contact the program director of the desired program to discuss the possibility of a transfer (e.g., details of program, capacity, selection criteria).

19. Residents who have submitted a formal transfer request to the PGME office should direct all requests for information regarding status to the PGME office.
20. Residents at McMaster who are in PGY1 or above are eligible to submit their internal transfer application by January 31 for a potential July 1 start. A second internal transfer application process will occur for McMaster residents in PGY2 or above each fall. McMaster residents can submit their internal transfer application by October 15 for a potential January 1 start, if agreed upon by the home and receiving programs. The internal transfer review occurs between February 1 and March 31 and October 15 and December 15 each year.
21. The national transfer application deadline is March 31 each year. Canadian Universities will not begin to distribute application packages to desired schools until one week after the second iteration of the CaRMS match. All applications will follow the normal program application review and decision-making process. National transfer applications will usually be considered for a July 1 start.
22. Externally sponsored residents interested in transferring for a July 1 start must submit their application using the same application process outlined above. Externally sponsored residents must have the transfer request pre-approved by their sponsor. McMaster is not responsible for any funding commitments if the resident fails to arrange funding with their sponsor prior to the transfer. Externally sponsored residents will not be released from their current program until their funding is secured for their new program. Externally sponsored residents interested in transferring outside of the timelines noted in this document must contact the PGME Manager at their home institution for instructions. It is important to note licensing requirements differ between provinces, and the licensing review/approval process, may delay the trainee's anticipated start date.
23. To be considered for a transfer, residents must submit a completed application package using the online [PGME Transfer Application Form](#). The application package includes consent to share the application with the desired program, a list of required documents, and a program preference rank order list (for internal applications only).
24. Submitted application packages will be forwarded to programs that have identified capacity to accept an additional resident. Internal applications will be forwarded sequentially to programs based on the rank order list provided by the resident in their application package. Consideration must be completed by one program before another program can consider the internal application. National applications will be distributed simultaneously to all programs and schools identified in a resident's transfer application if the receiving school has capacity and funding to support the transfer.
25. After completing the review of candidates through their selection process, programs will submit their recommendations to PGME.
26. PGME will consider and review all program recommendations simultaneously. Transfer decisions are based on several factors, including, but not limited to, recent/current transfers in and out of programs, societal need/demand of physicians in that specialty, the number of years of training remaining in the receiving training program, and most importantly, funding availability to support the transfer.

27. If approved for transfer, the receiving program and the resident will be notified by PGME.
28. The receiving program will submit a recommendation letter to PGME outlining the transfer credit (see CBD section for transfer credit process) for which the trainee is eligible to receive upon transferring into a new program. If the Associate Dean, PGME, approves the transfer, the transfer credit information will be included in the official Letter of Appointment (LOA) from PGME to the resident (details will be provided by the program). If the offer is accepted by the resident, PGME will be responsible for notifying the Royal College of Physicians and Surgeons of Canada (RCPSC) or the College of Family Physicians of Canada (CFPC) regarding the transfer.
29. The resident must discuss and determine their release date with the home program director if different from July 1 or January 1. Once an agreed-upon release date is selected, the program director will write a release letter for the transfer applicant, this document will be submitted to PGME at their home institution and the release date will be noted on the official transfer offer from PGME.
30. The resident will sign the transfer offer and return it to the PGME office. The PGME office will facilitate and finalize the transfer.
31. PGME will notify all applicants regarding the outcome of their application. Applicants not selected for an internal transfer may apply to the second iteration of CaRMS or be considered for a national transfer. Internal applicants will be notified regarding their internal request in advance of the CaRMS second iteration application deadline.
32. If a transfer request is approved, the following will occur:
 - 32.1 **Receiving Program Director must:**
 - 32.1.1 Create an offer letter for PGME. The letter must include, if applicable: credit for prior training (unless transferring into a CBD program – see CBD information below), exam dates, program rotation requirements, start/end date of the program, etc.
 - 32.1.2 **PGME Office must:**
 - 31.1.1. Notify the resident they have been recommended for a transfer supported by the PGME office and prompt the resident to discuss the transfer with their home program director.
 - 31.1.2. Request a formal release letter/email from the home program director (if directed by the resident to do so).
 - 31.1.3. Once the offer and release letter have been submitted to the PGME office, PGME will create a new contract including all details of the new offer (i.e., transfer credits, start date, new end date, etc.).
 - 31.1.4. PGME will issue a new LOA for the resident.
 - 31.1.5. PGME will notify the RCPSC of the transfer or CFPC of the transfer and applicable training credits awarded.
 - 31.2. **Resident must:**
 - 31.2.1. Discuss their intent to transfer with their home program director, request a release letter, and inform PGME when the home program has been notified (post-receipt of the offer).

- 31.2.2. Provide their home program director with written confirmation of their intent to withdraw from the program.
 - 31.2.3. Sign the new offer and return it to the PGME office.
 - 31.3. **Home program director must:**
 - 31.3.1. Discuss transfer request with the resident.
 - 31.3.2. Discuss possible release date with all necessary parties (including the coordinators of the rotations in which the resident is scheduled to rotate*) if the release date is not July 1. PGME is not included in the negotiation of alternative release dates.
 - 31.3.3. Submit a release letter for the resident to the McMaster PGME office, including the release date.
32. A transfer request that does not meet the principles outlined in this document may be brought forward to PGM: COFM as a special case at the discretion of the Associate Dean, PGME.

C2: Transfers and Competency by Design (CBD)

33. The same principles and processes will apply to residents who wish to transfer to a program that has transitioned to competency-based medicine. The information and process described in this section is specific to the following types of transfers after the resident has been accepted by the receiving program.

34. Types of transfer:

- Time-based program to CBD program
- CBD program to CBD program

35. Overview

- 35.1. The assessment of prior training for residents who wish to transfer **to a CBD program from a time-based program** will be based on the completion of previous rotations and achievement of learning objectives relevant to the receiving program. The program director and the Competence Committee of the receiving program may request resident evaluation data from the resident and/or program director of the home program to determine applicable credits based on the resident's prior training.
- 35.2. The assessment of prior training for residents who wish to transfer **to a CBD program from a CBD program** can also be based on the completion of previous rotations (as with the time-based model), as well as demonstrated achievement of competencies that apply to the receiving program at the time of the transfer request. The program director and the Competence Committee of the receiving program will determine applicable credits based on the resident's prior training.
- 35.3. Resident evaluation data may be requested of the resident and/or program director of the home program. Once the transfer approval process is complete, the program director and the Competence Committee of the receiving program will create a learning plan for the incoming resident to place them onto their new learning pathway at the most appropriate stage of training.

The RCPSC has provided a [CBD Technical Guide for Transfers](#).

36. Process

- 36.1. After the resident has been accepted into the receiving program, the program director/Competence Committee may opt to start the resident at a PGY1 level or a more appropriate level of training. This may be revised after a review process within the first 6 months of training. The PGME office will issue a LOA at the entry-level assigned and revise accordingly. The resident will be paid in accordance with their new PGY level.
- 36.2. The assessment of previous training completed for transfer credit will occur within 6 months of the resident's start date in the receiving CBD program.
- 36.3. Transfer credit for residents entering a CBD program will be assessed and recommended by the program director and Competence Committee of the receiving program through:
 - 36.3.1. A review of the resident's previous clinical/non-clinical learning experiences and achievement of Entrustable Professional Activities (EPA) relevant to the receiving program.
 - 36.3.2. A period of clinical assessment, approximating 6 months, to observe and verify the resident's level of competency with respect to EPAs achieved or in progress at the time of transfer.
 - 36.3.3. Once the resident's stage and level of training is confirmed, the program director and Competence Committee will ensure the resident's learning plan reflects their learning pathway. The program director will notify the Associate Dean, PGME.

37. Notification to PGME of Applicable Transfer Credit

- 37.1. The program director will notify the Associate Dean, PGME in writing; the following details should be included:
 - 37.1.1. EPAs accepted through review of the resident's training experiences and the assessment of the resident.
 - 37.1.2. Verification of the current stage of training.
 - 37.1.3. Recommended PGY level.
 - 37.1.4. Expected date of completion of training.
- 37.2. The Associate Dean, PGME, will review the transfer credit recommendation from the program and, if approved, will respond by email approving/rejecting the recommended transfer credit. Once approved by the Associate Dean, PGME, the Administrator to the Associate Dean will notify the program that the transfer credit has been approved and the resident Program Administrator will note the approval in the resident's MedSIS account.

C3: Provincial/National Transfer Application Process

38. Ontario Ministry of Health-funded residents are free to seek transfer of residency programs outside McMaster University and within Ontario and other provinces within Canada. It should be noted that **funding is not transferrable between institutions**. Transfer requests outside of McMaster will be considered after the second iteration of CaRMS. Residents are encouraged to review the [National Transfer Policy](#) for more information.

39. PGME at McMaster will facilitate all external transfer applications on behalf of all McMaster residents. PGME at McMaster will contact the universities listed on the resident's application to investigate potential transfer capacity and funding. If capacity and funding exist in desired program(s), the resident's application will be forwarded for consideration to all the universities listed on the application form simultaneously.
- 39.1. If the external receiving university does not wish to proceed with the application, the McMaster PGME office will contact and update the resident.
- 39.2. If the external receiving training program would like to proceed with the application, the receiving program will contact the resident directly to set up an interview.
40. If the external receiving program is interested in accepting the resident, the following will occur:
- 40.1. **Receiving University must:**
- 40.1.1. Provide an offer letter to the resident, contingent upon release from their program.
- 40.1.2. Provide the McMaster PGME office with a copy of the offer letter.
- 40.1.3. Upon receipt of the release letter from McMaster, provide the resident with an official contract.
- 40.2. **McMaster PGME Office must:**
- 40.2.1. Confirm the resident has been approved for an external transfer to the new university.
- 40.2.2. Prompt the resident to discuss the transfer with the home program director.
- 40.2.3. Once the McMaster PGME office receives the release letter from the program, an official release letter will be sent to the PGME office at the new university.
- 40.3. **Resident must:**
- 40.3.1. Discuss their intent to transfer with their home program director (after receiving an offer) and inform PGME when the home program is notified.
- 40.3.2. Provide their home program director with written confirmation of their intent to withdraw from the program.
- 40.3.3. Sign the new contract, return it to the external receiving university and provide McMaster PGME with a copy of the signed contract.

NOTE: The acceptable transfer date for all national transfer applications is June 30. An earlier transfer date for national transfers is not feasible; however, a later date may be required to facilitate all required and necessary steps to coordinate the transfer.

Appendix

Appendix 1: Transfer Process Timeline – Application Deadlines January 31, March 31, and October 15

December

- PGME notifies all McMaster PGY1 residents of the internal transfer process and upcoming deadline January 31 via email.

January

- January 31 internal transfer application deadline.

February

- PGME determines physical capacity in programs with program directors based on applications received.
- PGME assesses financial capacity to support internal transfers.
- PGME reviews applications and forwards application packages to programs that have indicated capacity, who have the potential to be funded.
- Program director reviews applications and proceeds with the interview process for selected candidates. PGME notifies applicants when no capacity is available in the program.

March

- Programs recommend internal applicants for transfer to PGME.
- PGME reviews transfer recommendations and approves/declines (must be completed before 2nd iteration of CaRMS application deadline).
- Residents are notified of internal transfer outcomes.
- Applicants who are successful during the internal application process will receive an admission package.
- Applicants who are unsuccessful in the internal application process must confirm with PGME if they wish to proceed to the national transfer process.
- March 31 national transfer application deadline.

April- May

- After the 2nd iteration of CaRMS, one week post match, external application packages are sent to PGME offices that have indicated capacity in the identified programs.
- Programs review application packages, invite residents for interviews, and select/decline candidates for transfer with home institution.

June

- Successful internal applicants are sent their official transfer package.
- National transfer facilitation continues, if successful offer packages may be distributed.

July

- Successful transfer applicants start the new program.
- National transfer application process continues.

August

- PGME notifies all PGY 2-4 residents of the internal transfer process and upcoming internal transfer deadline on October 15 via email.
- National transfer application process continues.

September

- National transfer application process continues until September 30.
- All applicants notified of the final decision regarding their application.

October

- October 15, PGY2-4 internal transfer application deadline.

November

- PGME determines physical capacity in programs with program directors for internal transfers.
- PGME reviews applications and forwards application packages to programs that have indicated capacity.
- Program reviews applications and proceeds with the interview process for selected candidates.
- PGME notifies applicants when no capacity is available in the program.
- Internal applicants proceed to the interview phase or are notified that they have not been selected to proceed to the interview process.

December

- Programs recommend applicants for internal transfer to PGME.
- PGY2-4 internal transfer applicants will be notified if a transfer is feasible for a January 1 start.
- PGME notifies all McMaster PGY1 residents of the transfer process and upcoming deadline on January 31 and March 31 via email.