



SAOA POLICY ON FELLOWSHIPS: ENDORSEMENT CRITERIA

JULY 2015

POLICY APPROVED BY THE SAOA EXECUTIVE COMMITTEE, JULY 20

1. Introduction

A Fellowship program needs to transfer knowledge **and** skills to a susceptible candidate.

The Fellowship handbook is the patient that must be read through the eyes of the expert.

This expertise is available in South Africa in two vastly different sectors, that can with Fellowship programs especially, work together to optimally transfer knowledge and skills to the benefit of the fellow, and ultimately to the benefit of the patient.

This document outlines the criteria to be used by SAOA, the professional association representing orthopaedic surgeons, to endorse Fellowships offered by individuals and entities, as being of merit and in line with applicable legal- and ethical principles.

It is expected that all SAOA members who act as Fellowship Consultants, sign an Agreement with SAOA, which binds such Consultant to this Policy and the principles embodied herein (Annexure "A").

Although SAOA will, in broad terms, measure a proposed fellowship against the criteria outlined in this document, it is not an official educational accreditation body, and it is recognized that only accredited bodies, such as the HPCSA and universities are by law entitled to offer, accredit and confer qualifications. SAOA will however issue a certificate signaling the completion of the endorsed fellowship to the specific fellow.

A copy of the certificate is attached hereto as Annexure "B".

2. Reason for Endorsement by the SAOA:

SAOA endorses Fellowships and fellowship programs for the following reasons -

- (a) To serve as an indicator of Fellowship program credibility, in that a specific number of cases would have been done, research had been done, etc.
- (b) To enable the fellowship program to be sponsored, although endorsement does not guarantee any sponsorship or sponsorship opportunity being available or possible, and all sponsorships have to align with legal- and ethical criteria.
- (c) A fellowship is a possible stepping stone to accreditation in future and super-specialisation.
- (d) To indicate SAOA's active support of further education and research, which are based on sound criteria.
- (e) For a fellow to receive a SAOA fellowship endorsement certificate after successful completion of fellowship from the Fellowship consultant.

3. Criteria used by SAOA for endorsement:

The endorsement of a Fellowship will be based on the following:

- (a) Compliance with the criteria for specific fellowship that comply with the criteria as laid down by the SAOA (see point 4) and contained in this Policy.
- (b) Transparency of the fellowship program, criteria and proof of financial appropriateness of use of fellowship funds / proof of corporate governance compliance and tax clearance certificate.
- (c) Period and educationally sound evaluation of fellow and the program, including but not limited to the following outputs:
 - Surgical logbook.
 - Research results (publication; presentation at SAOA congress)
 - Consultant's report.
 - Fellow's report.
- (d) Signing of agreement between SAOA and Fellowship Consultant.
- (e) Signing of an agreement between the Fellow and the Fellowship Consultant.
- (f) It is the responsibility of the Fellowship Consultant to align the fellowship with the HPCSA and all applicable laws and regulations, but SAOA reserves the right to request proof of such compliance in cases of complaints or concerns being raised by the Fellow or any third party.

4. FELLOWSHIP CRITERIA:

4.1 The Fellowship program

(a) Consultant

The Consultant should have the following:

- Adequate expertise and skills in the field(s) of the fellowship.
- Adequate time to provide guidance, oversight and effective control over the Fellow and the Fellowship Program, including time to administer and oversee log books and research.
- Adequate finances / Sponsorship, which means that the Fellow can be paid a reasonable salary or honorarium or monthly stipend, and all such should not be perverse and not amount to double billing of patients or medical schemes, for example, and which financial arrangements have to comply with the legislative frameworks as outlined in the Fellowship Consultant Agreement in Annexure "A".
- Membership of SAOA or one of its recognized subgroups.
- Where applicable, be participating in the SA National Joint Registry.

(b) Participating sites

- Letter of agreement between Fellowship Consultant and participating site authorities such as the hospital manager or hospital CEO, and where the public sector is involved, a letter also from the Head of the Provincial Department of Health or his/her delegate, in line with the National Treasury Regulations, 2005

(c) Personnel and resources

- Faculty – there should be a sufficient number of sufficiently trained and experienced orthopaedic surgeons to instruct and supervise the Fellow until he/she reaches the desired levels of proficiency in the specific field or fields, including other healthcare professionals (who should be informed of the Fellow and his/her role(s) in patient care).
- Other personnel – technical and/or administration staff so as to handle the increased workload brought about by the Fellow.
- Resources – theaters, in-patients and out-patients (all of whom should be aware that care would be provided by the Fellow under supervision and guidance of a Fellowship Consultant), etc.
- Medical information access, which also necessitates compliance with the POPI Act and all privacy and confidentiality requirements.

4.2 Fellow appointments

(a) Contract/Agreement between the Fellow and the Fellowship Consultant

- Minimum qualifications (registered with the Health Professional Council of South Africa as an Orthopaedic surgeon, maintenance of registration through payment of annual fees)
- Clinical responsibilities to be outlined, including complete description of the Fellowship Program, including activities to be conducted under supervision and guidance and all associated responsibilities, e.g. keeping of log, regular report-writing, research project, etc. and activities that can be conducted independently.
- Duty hours, after hours and leave provisions, including compliance with labour legislation.
- Salary / assistant generated remuneration
- Supervision, consultant's responsibilities
- Professional Insurance / indemnity cover
- Details of the components of the 6 months / 1 year Fellowship Program
- Travel, time off for congresses and the approval thereof, as well as arranged visitations
- Research project requirements
- Billing to medical schemes
- Adherence to practice policies and procedures
- Informing patients that Fellow is on a Fellowship, explaining meaning
- Termination

(b) Eligibility of fellow

- Performance periodically assessed to:
 - Ensure adequate standards of patient care and
 - Ensure that fellowship objectives are being achieved

4.3 Educational Program

(a) Curriculum, - skills and competencies

- A structured goal orientated course program must be in place.
- The program must not interfere negatively on registrars training.

Surgical and other technical skills must be transferred, including -

- Fellow must perform pre-determined amount of surgical procedures and keep a logbook thereof

- The type of procedures should be outlined
- There should be a measurable surgical competency level, which must be included in the program description
- Skills transfer should include a theoretical component, observership periods, periods of assisting skilled professionals and surgical hands-on exposure under supervision.
- Where applicable a laboratory and /or cadaver facility that's accessible.

Clinical competence which includes the development of -

- Clinical decision pathways.
- Patient care and procedural skills
- Medical knowledge
- Interpersonal and communication skills
- Knowledge of anatomy, physiology, biomechanics, pathology, microbiology, pharmacology, as it relates to the field(s) of the fellowship

Time allocation to be worked out and adhered to -

- Clinical patient assessments
- Assisting fellowship consultant
- Performing surgery
- After hours clinical work
- Research
- Discussions
- Teaching

(b) Research that -

- Relates to field of Fellowship
- Is original and peer reviewed
- Has adequate funding in place
- Has ethics approval obtained and is undertaken in compliance with 2014 Research Regulations published in terms of the National Health Act
- Is published and presented at appropriate forum (SAOA congress)
- Is regularly monitored and mentored through the Fellowship Program
- Ensures the availability of a literature search service, textbooks and journals

5. APPLICATION PROCESS

5.1 Application is to be made by the Fellowship Consultant to SAOA EXCO that include the following:

- Type of fellowship
- Duration
- CV of program consultant
- Contact details
- Other consultants and related healthcare professionals involved
- Details of primary and additional institutions and sites of fellowship
- Fellowship program that includes the aspects outlined above in 4.3
- The criteria for specific fellowship as outlined under minimal fellowship criteria
- Financial structure including sponsorship(s)
- Permission from Departmental Head, Head of facility and employer, where applicable

5.2 The application will be assessed by a committee appointed by SAOA EXCO.

6.1 The committee will assess applications twice a year in accordance with compliance with this policy and any other relevant factor that relates to the objectives of the SAOA

6.2 Where the program has been endorsed by the committee, the endorsement period will be for three years, such to review, should changes to a program be necessary.

6.3 Once endorsed, the Fellowship Program will be listed on the SAOA website.

6.4 After completion of program by the fellow the following needs to be submitted to the committee before his/her fellowship can be endorsed by the SAOA:

- Surgical logbook
- Research results
- Consultant's final report
- Fellow's final report

6.5 After completion of the fellowship program to the satisfaction of the fellowship committee a "Certificate of completion of an SAOA endorsed fellowship" will be issued to the Fellow.

ANNEXURE A:

TEMPLATE AGREEMENT BETWEEN FELLOWSHIP CONSULTANT AND SAOA ON ENDORSEMENT OF FELLOWSHIP PROGRAM

I have read and accept the SAOA endorsement criteria as laid down under the Policy document “SAOA Policy on Fellowships: endorsement criteria”

I understand that the SAOA can only endorse the program on the basis of the information provided to them, and that the SAOA cannot take any responsibility for the actual fellowship program itself, its impact on any fellow, consultant, patient or any other person.

I understand that where sponsorship(s) accompany the fellowship and where the public sector, or public monies, and/or public sector employees are involved, I have to ensure compliance with the following laws:

- Public Finance Management Act and National Treasury Regulations, 2005 on all donations and sponsorships;
- The Public Service Act, and in particular the rules applicable to the Senior Management Service;
- The SA Marketing Code, where sponsorships from the pharmaceutical- and medical device industry is concerned.

I further undertake to, where medical schemes could be billed for cases where the Fellow is involved, deal with such billing in a manner that is fair and transparent, with adequate patient consent, and to not bill for procedures and salaries already covered by sponsorship(s).

I undertake to, when so requested provide proof of compliance with the SAOA criteria and to co-operate in any matter where concerns or complaints are raised with SAOA in relation to the fellowship.

I undertake to ensure that the Fellowship will be conducted in accordance with good clinical practice- and educational principles, in a manner that is ethical and legal and compliant with principles of good corporate governance.

SIGNED

DATE

FELLOWSHIP CONSULTANT

ANNEXURE B:

TEMPLATE SAOA CERTIFICATE OF ENDORSEMENT

This certificate confirms that

(Full names and surname)

Has completed a SAOA Endorsed Fellowship *

In the field of

(Insert)

As hosted by

(Full names and surname)

At

(Facility/facilities)

And which took place from _____ to _____

Signature: SAOA CHAIRPERSON _____

***SAOA endorsement takes place in terms of the SAOA Policy and criteria for Fellowships. It does not constitute a certificate of competence or an accreditation as envisaged in South African healthcare professional or education legislation.**