



AMERICAN ACADEMY OF
ORTHOPAEDIC SURGEONS

AMERICAN ASSOCIATION OF
ORTHOPAEDIC SURGEONS

Board of Specialty Societies Fellowship Committee Meeting

Agenda and Background Materials

March 29, 2021, 7:00 – 8:00 p.m. CST

GoToMeeting

<https://global.gotomeeting.com/join/253566285>

Board of Specialty Societies Committee Meeting

(Videoconference)

Monday, March 29, 2021

7:00-8:00 p.m. CDT

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NEW BUSINESS (All)

1. Vote Fellowship Committee Vice Chair	61
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CLOSING REMARKS (Dr. Wolf)

8:00 p.m. **MEETING ADJOURNS** (Dr. Wolf)

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**Board of Specialty Societies
Fellowship Committee - Leadership Summary**

(as of October 2017)

BOS Fellowship Oversight Committee	
Mission Statement:	Provide oversight and direction for orthopaedic fellowship programs. Ensure a fair and transparent match process and fellowship year for the applicant, fellow, and program. Foster the development and maturation of uniform educational standards as well as relationships with ACGME, ABOS and other accrediting/recognizing institutions.
Charges:	<ol style="list-style-type: none"> 1. Establish, promote, and monitor “common” fellowship elements, such as application forms and announcement dates. 2. Serve as the orthopaedic fellowship information clearinghouse, including the match. 3. Troubleshoot difficulties of development, implementation, or maintenance within individual subspecialty fellowship programs. 4. Provide a forum for strategic discussions of fellowship issues and concerns of residents and orthopaedic residency and fellowship program directors. 5. Increase transparency and communications regarding the fellowship process. 6. Serve as a forum for discussion and resolution of concerns or conflicts, including those related to common accreditation requirements. 7. Maintain and report fellowship data which includes demographics on applicants, fellows, outcomes and results. 8. Work with the subspecialty societies to facilitate the development and updating of guidelines and competency measures across specialty society fellowships. 9. Create educational tools to enhance residents' knowledge of, and experience with, the orthopaedic fellowship process, subspecialties, and related topics. 10. Provide any needed oversight of the centralized infrastructure supporting alternative accreditation pathways. 11. Inform the AAOS Board on any fellowship issues. 12. Oversee the development and implementation of the Fellowship Directors' Forum and its related activities.
Meeting Times:	Annual Meeting Late summer/early Fall Conference Calls - at the discretion of leadership

	Webinars
Expectations of the Chair:	<p>Develop meeting agendas with staff; lead meetings; develop, implement, and periodically report annual goals</p> <p>Participate in leadership calls as scheduled</p> <p>Attend Annual Meeting, NOLC, and Fall Meeting</p> <p>Provide written reports for three BOS business meetings; lead the development of an annual report</p> <p>Attend the AOA Council of Residency Directors meeting (June), when applicable; opportunity to present @ CORD meeting</p> <p>Interact with the Association of Residency Coordinators of Orthopaedic Surgery; opportunity to present @ ARCOS meeting</p> <p>Develop and maintain relationship with ACGME and ABOS</p> <p>Work with AAOS committees, including the Resident Assembly, as necessary to meet charges</p>
Expectations of the Vice-Chair:	Assist the Chair in developing meeting agendas, leading meetings, developing and implementing actions; assume the Chair's responsibilities should the Chair not be able to do so.
Composition:	<p>Chair – to be elected by the committee members.</p> <p>Vice Chair – to be elected by the committee members.</p> <p>Ten (10) members – one from each of the eight subspecialty fellowship programs including one each from the Adult Reconstruction and Tumor program, and one each from Sports and AANA.</p> <p>Another individual selected from the chair's subspecialty fellowship program would fill the vacancy created by the chair selection.</p>
Terms of Office:	<p>For chair; one three (3) year term; eligible for one (1) additional three (3) year term</p> <p>For vice chair; one three (3) year term; eligible for one (1) additional three (3) year term</p> <p>For members; one three (3) year term; eligible for one (1) additional three (3) year term</p>
Staff Liaison:	Manager, Governance and Affiliate Relations

2019-2023 Strategic Plan

MISSION STATEMENT

Serving our profession to provide the highest quality musculoskeletal care

GOAL 1: Deliver a personalized and seamless member experience

METRICS

1. Increase in volume of member specific data collected and analyzed on member needs and preferences
2. Increase in user satisfaction and utilization of content delivery platform
3. Increase in the proportion of content and education personalized to user needs and preferences
4. Increase in member retention and recruitment

STRATEGIC OBJECTIVES

- Use data to define individual member needs and preferences
- Invest in internal processes and capabilities to transform AAOS's platform and portfolio to deliver personalized and seamless user experiences
- Develop strategic partnerships to further enhance AAOS's offerings

VISION STATEMENT

The trusted leaders in advancing musculoskeletal health

GOAL 2: Equip members to thrive in value-based environments and advance the quality of orthopaedic care

METRICS

1. Increase in adoption of AAOS's quality solutions and tools by members
2. Increase in the proportion of AAOS products that deliver education and data on cost/value
3. Increase in member and institutional participation in AAOS's family of registries
4. Increase in member utilization of evidence-based and high value treatments
5. Decrease in member utilization of non evidence-based and low value treatments
6. Increase in % of professional reimbursement tied to value based care delivery

STRATEGIC OBJECTIVES

- Develop a definition of quality and effectiveness that incorporates cost
- Educate members on the opportunities of moving to value-based environments
- Expand data capture through AAOS registries and reduce the burden of data entry
- Prioritize the development and roll out of practical solutions and tools
- Integrate AAOS's advocacy and quality efforts to advance the quality of MSK health
- Collaborate with payers, regulators, purchasers, industry, and others to influence future change in MSK health care delivery and professional reimbursement

CORE VALUES

Leading to serve Shaping our future Excellence together

GOAL 3: Evolve the culture and governance of AAOS's board and volunteer structure to become more strategic, innovative, and diverse

METRICS

1. Increase in awareness and impact of new core values and associated behaviors
2. Advancement in AAOS's governance reflecting best practices
3. Identify a baseline and establish a goal for increasing diversity among AAOS's board and volunteer structure
4. Increase in amount of revenue generated from new investments in innovation

STRATEGIC OBJECTIVES

- Measure AAOS's culture and define a refreshed set of core values and behaviors
- Develop and execute a rollout plan to embed new core values and associated behaviors in AAOS's culture
- Continue evolving AAOS's governance to reflect best practices
- Train new leaders of AAOS's board and volunteer structure on strategic focus and governance best practices
- Discuss, evaluate, and establish a goal to increase diversity among the leadership of AAOS's board and volunteer structure
- Establish an innovation process in AAOS with the goal of identifying future investments in innovation projects

KEY ENABLERS

- **Advocacy:** Advocate to advance access to and quality of MSK health care, and support providers to thrive in an evolving health care environment
- **Communication:** Communicate renewed member value stemming from new strategic plan

- **Partnerships:** Partner to develop the right content, programs, and platforms to increase member value and drive greater impact
- **Technology:** Continue modernizing AAOS's technology platforms to offer seamless experiences

AAOS Core Values

Leading to serve

1. We relentlessly focus on **enabling our profession** to better **serve our patients**
2. We **mentor** and **support** our members to drive excellence in musculoskeletal health
3. We engage members, partners, and patients where they are, and **lead them forward**
4. We practice transparent **decision-making** and **open communication**

Shaping our future

1. We use **data** and **evidence** to stay a step ahead
2. We **advocate** to promote **quality musculoskeletal care**
3. We proactively **embrace disruptors**, and develop innovative products and services

Excellence together

1. We **empower** and seek **input from all people**, not just the majority
2. We acknowledge **unconscious biases**, and seek to address **barriers to inclusion**
3. We **collaborate** based on mutual **respect and trust**

**Board of Specialty Societies Fellowship Committee
Videoconference
Friday, August 28, 2020**

Draft Minutes

Attendance:

Committee Members

Brian R. Wolf, MD, FAAOS, Chair	Rajiv Rajani, MD, FAAOS
Scott P. Steinmann, MD, FAAOS, Vice-Chair	John C. Richmond, MD, FAAOS
Dirk H. Alander, MD, MHA, FAAOS	C. Craig Satterlee, MD, FAAOS
Jeffrey R. Dugas, MD, FAAOS	Andrew J. Schoenfeld, MD, FAAOS
James R. Holmes, MD, FAAOS	James W. Stone, MD, FAAOS
Madhav A. Karunakar, MD, FAAOS	Marcella Rae Woiczik, MD, FAAOS
Dawn LaPorte, MD, FAAOS	

Drs. Aaron Guyer and Michael Taunton were unable to participate.

Staff & Guests (Attending for all or portions of the meeting)

Meredith Herzog, AOSSM	Becca Daly, AANA
Tracy Sferra, AAOS	Kerri Mink, MSTs
Elaine Leighton, CAE, AOFAS	Debra Meyer, AOFAS
Natalie Loper, AAHKS	Dennis Thomaston, SF Match
Donna Malert, CAE, AAOS	Teri Stech, POSNA
Colleen O'Brien, NASS	Steve Mlodoich, ASES
Rachel O'Connell, OTA	Anna Quintanilla, ASES
Evette Thompson, AAOS	Renalin Malvar-Ledda, AAHKS
Guadalupe Trejo, AOFAS	

I. Call to Order / Opening Remarks

Dr. Brian R. Wolf called the meeting to order at 9:00 a.m. p.m. CDT. Dr. Wolf welcomed everyone on the call and thanked everyone for taking time away from their practices to participate today.

II. Consent Agenda

The minutes of the May 26, 2020 and June 23, 2020 Fellowship Committee were reviewed.

APPROVED MOTION: Accept the Consent Agenda as presented.

III. Discussion Items

A. 2020 Match

Dr. Wolf reviewed the data from the 2020 Match cycle. Committee members or representatives from each specialty society provided updates on match and survey results. The responses were positive and over all the single match application was a success.

B. Single Match Timeline

Dr. Wolf stated all programs, with the exception of Hand, will follow the same Match timeline for the 2020-2021 season. Applicant registrations opened on August 3, 2020 and Hand will begin September 16, 2020.

C. Code of Conduct

Dr. Wolf reviewed the unified code of conduct for the specialties participating in the single match. This was approved at the August 23, 2019 meeting. Dr. Wolf stated it was the responsibility of the specialty societies to reinforce the Code of Conduct for Fellowship Programs. The Code of Conduct will be sent to the Resident Assembly to disseminate as a reminder to upcoming match applicants.

D. SF Match Update

Dennis Thomatos, Manager, SF Match stated there were no issues with the 2020 consolidated match. He shared the changes being made to the platform which will enhance the user experience for both the applicants and programs.

E. Data Sharing

Dr. Wolf stated that he will be meeting with Melissa Young, AAOS General Counsel, to develop a data usage agreement with SF Match.

F. Virtual Interviews for Fellowship 2020-2021

Dr. Wolf stated the BOS Fellowship Committee recommended, and the AAOS Board of Directors approved the recommendation, that fellowship interviews be done virtually for the 2020-2021 cycle. The committee agreed on the importance of an equitable experience for both applicants and programs.

G. Webinars

Dr. Wolf discussed the increased participation in the Fellowship Committee webinars this year. Dr. Wolf asked for feedback on the October webinar, Pearls for Fellowship Programs on Virtual Interviewing, agenda. Dr. Wolf thanked the committee members for taking time out of their busy schedules to serve as faculty for the fellowship webinar series.

H. AAOS Housed Fellowship Directory

Evette Thompson, AAOS Member Career Center Team Member, provided an update on the fellowship directory for resident applicants. The site is continually updated as fellowship program information is received. The directory can be found under career center on the AAOS website.

- I. Fellowship Directors' Forum add discussion re virtual season
Dr. Wolf stated the Fellowship Directors' Forum will be held at the 2021 Annual Meeting. The committee agreed a discussion regarding the virtual interview season should be added to the program. The Forum will be discussed further at the March 2021 committee meeting.
- J. Future Meeting Dates
The BOS Fellowship Committee will meet in March 2021. The committee will also hold a meeting during Annual Meeting, August 31-September 2, 2021.

IV. New Business

- A. New Fellowship Committee Chair
Dr. Brian Wolf announced that his term as Chair will end following the March 2021 committee meeting. He thanked Dr. Scott Steinmann for supporting him as Fellowship Committee Vice Chair. Dr. Wolf recommended Dr. Steinmann as successor following the March 2021 meeting. The Committee was in support of this recommendation. Dr. Wolf stated the committee members should email Tracy Sferra to support or oppose this recommendation.
- B. Nomination Fellowship Committee Vice Chair
Dr. Wolf announced that nominations will be accepted for the BOS Fellowship Committee Vice Chair position and shared the expectations. Nominations for the position of BOS Fellowship Committee can be emailed to Tracy Sferra. The committee members will vote on the Vice-Chair position at the March 2021 meeting.

V. Closing Remarks

Dr. Wolf stated that the next BOS Fellowship Committee meeting would be scheduled for March 2021. Tracy Sferra would contact the committee with the determined date.

VI. Adjournment

There being nothing further to come before the BOS Fellowship Committee, Dr. Wolf adjourned the meeting at 10:41 a.m. CDT.



SF Match Migration

CHANGES FOR PROGRAMS AND THE SOCIETY

3/29/2021

Dennis Thomatos
SF Match Manager

New concepts For Programs

- ▶ Role and Title are assigned to each user
- ▶ Role is either DIRECTOR or ASSOCIATE
- ▶ Title can be anything
- ▶ Examples
 - ▶ Role: Associate, Title= Faculty
 - ▶ Role: Associate, Title= Chair
 - ▶ Role : Director, Title= Associate Program Director
 - ▶ Role: Director, Title= Professor
 - ▶ Role: Director, Title =Director

Roles and Titles

- ▶ Users will be migrated with existing titles but will need to verify
- ▶ Multiple director roles allowed and will be displayed in the directory
- ▶ Can get onerous. There can be dozens of titles within a specialty so only the Role can identify the program director.
- ▶ Program Chair that was the director may migrate as Program Director

New System Users

Home / Programs / Washington University #3364

PROGRAM **USERS** MATCHES TRANSACTIONS NOTES HISTORY

Add Program User

Add Existing User



Name	Email	Main Contact	Status
Arsham Sheybani Director	shebaniar@wustl.edu	<input type="radio"/>	Pending
Blake Padilla Associate	sfmatchadmin1@sfmatch.org	<input type="radio"/>	Pending
Todd Margolis Associate	toddmargolis@wustl.edu	<input type="radio"/>	Pending
Kisha Piggott Director	piggottk@wustl.edu	<input type="radio"/>	Active
Amy Jones Associate	jonesa@wustl.edu	<input checked="" type="radio"/>	Active
Olivia Jensen Associate	ojensen@wustl.edu	<input type="radio"/>	Active

Program has 2 director roles

What applicants see

Both director roles are shown to applicants
Dr. Sheyban has never logged into the system
but is shown to applicants.

3364 Washington University

 Positions Available: 5  Application Deadline: 09/15/2020

Directors: Arsham Sheybani, MD, Program Director
Dr Kisha Piggott, MD, PhD, Co-Director

Takeaway

**Programs will need to review their users in the system
before the match opens**

Society Portal

- ▶ Society portal is being implemented for the fall 2021
- ▶ access to limited program information
- ▶ Program Positions, Balance due, #applications, Rank submitted
- ▶ Summary of applicant totals by subspecialty
- ▶ Total for US Grad, DO Grad, IMG names and contact not in portal

New Features takeaway

- ▶ Applications can be assigned to specific faculty for review
- ▶ Integrated video interview scheduler. Allows for pass through Webex, Zoom. Mobile friendly, timers, user controls
- ▶ Programs can request a position count change and a name change within the system subject to approval process
- ▶ Search filter allows for granular search by “ publication type, Degree, Medschool, current residency, honors, work history etc..
- ▶ New messaging portal that has message history of sent memos etc...
- ▶ Integrated instructions for programs are included inside the portal

Match Results and vacancy

- ▶ System will be programmed to send results to the Program Director regardless of system settings, login status.
- ▶ Communication settings for all other users are fully functional(director can manage access)
- ▶ Vacancies are fully automated in the new system and programs are asked at rank time if they want unfilled positions posted
- ▶ Fellows will be able to directly apply to vacancies from our website.

2020-21 Interview Season

- All Virtual Interview Season
 - COVID
 - Level playing field for applicants and programs
- Seems to have gone smoothly so far
- We will be surveying programs about effect of virtual season
- Applicant pool is larger
 - ? Job market for those who would otherwise enter practice
 - 92% apply to one subspecialty – stable
 - Applicants applied to average of 32 programs this cycle
 - up from average of 30 last year.

Applicant Distribution to #Subspecialties	2020 #applicants	% of total	2021 #applicants	% of total
1	786	91	845	92
2	34	4	31	3
3	14	2	11	1
4	8	<1	13	1.4
5	8	<1	10	1
6	6	<1	4	<1
7	6	<1	4	<1
8	2	<1	4	<1
Total Distributions 2021			864	922

2020-2021 Match so far..... (*does not include hand data)

Program Data		
	Participating Programs	Positions Offered
	April 2020	April 2020
Adult Hip & Knee	96	193
Foot & Ankle	45	75
Musculoskeletal Oncology	20	26
Pediatric Orthopaedic	44	72
Shoulder & Elbow	27	37
Spine Surgery	66	132
Sports Medicine	90	227
Trauma	61	91
	449	853

Program Data 2020-21		
Subspecialties	Participating Programs (Change)	Positions Offered (Change)
Adult Hip and Knee	103 (+7)	204 (+11)
Foot and Ankle	49 (+4)	80 (+5)
Musculoskeletal Oncology	20	25 (+1)
Pediatric Orthopaedic	45 (+1)	74 (+2)
Shoulder and Elbow	28 (+1)	38 (+1)
Spine Surgery	68 (+2)	133 (+1)
Sports Medicine	90	226 (-1)
Trauma	62 (+1)	93 (+2)
	465	873

Overall:

16 new fellowship programs in SF Match
 20 new fellowship positions available

Applicant data / Trends (*does not include hand data)

Specialty	Total Appl. 2019	Total Appl. 2020 (Change)	Total Appl. 2021 (Change)	Position available '21
Adult Hip and Knee	233	256 (+23)	267 (+11)	204
Pediatrics	78	83 (+5)	96 (+13)	74
Sports Medicine	256	256	270 (+14)	226
Trauma	132	143 (+11)	123 (-20)	93
Shoulder and Elbow	67	61 (-6)	64 (+3)	38
MSK Oncology	40	36 (-4)	48 (+12)	25
Spine Surgery	140	144 (+4)	182 (+38)	133
Foot and Ankle	76	83 (+7)	84	80

Board of Specialty Societies (BOS) Fellowship Committee

Note: The following Code of Conduct applies to orthopaedic fellowships participating in the single match. The Code of Conduct may be used as a guide for those fellowships outside of the single match.

CODE OF CONDUCT FOR FELLOWSHIP PROGRAMS

Orthopaedic Fellowship Programs:

Regarding Applications Process:

1. Advise all applicants of receipt of their completed application by email, phone or mail.
2. Extend interview invitations, rejections or wait list status to applicants within 30 days of the application close date.

Regarding Interview Process:

3. Provide a fair interview process for all applicants in attendance. The interview process should include an overview of the program and the opportunity to meet the faculty involved with the fellowship program and any current fellow(s).
4. Do not, prior to the match, guarantee that an applicant will match at that program.
5. Provide contact information for current and former fellows if requested.
6. Never demand, imply, or mandate a pre-interview or post-interview visits by an applicant as a necessary component in the fellowship selection and/or evaluation process.

After the Interview:

7. Do not contact applicants after the interview.
 - Thank you notes and emails to applicants are discouraged.
8. Do not communicate with an applicant by mail, email or phone to inquire about or influence how the applicant will rank the program.
9. Do not communicate with faculty or others at the applicant's current program regarding the applicant's rank, or to provide feedback regarding the applicant's status at the fellowship program after the interview.

Board of Specialty Societies (BOS) Fellowship Committee

CODE OF CONDUCT FOR APPLICANTS TO ORTHOPEDIC FELLOWSHIPS

Regarding Application and Interview Scheduling Process:

1. Recognizing that only a limited number of interview slots are available at any given fellowship, applicants should only accept interviews at programs in which they are very interested. Once accepted, an interview should not be cancelled if at all possible.
2. If an applicant needs to cancel an interview, then the applicant should notify the fellowship program as soon as possible. At least two weeks notice of cancellation is appreciated so that the program may invite another applicant with sufficient time. Confirm that the program has received notice of your cancellation by via email or a phone call.
 - Applicants should be aware that the fellowship program, at its discretion, may communicate with the applicant's residency director if the fellowship program considers that the cancellation was given without sufficient notice or for an unacceptable reason.
3. Applicants should ask all fellowship program related questions at the interview to avoid post-interview communication.

After the Interview:

4. Do not ask the program director, faculty or attendings how you will be ranked at any time or contact the fellowship program to express an interest in the program after an interview.
 - Thank you notes and emails are discouraged
5. Applicant questions regarding program logistics and due diligence which come up after the completion of the interview should be directed to the program coordinator, not to the program director, faculty, or attending physicians. Prohibited topics include applicant interest in fellowship program and rank placement
6. It is also discouraged for the applicant's residency program faculty to contact the fellowship program's faculty after the interview has occurred to express interest on behalf of the resident, or to solicit information on the applicant's rank status..

Regarding Fellowship Match Process

7. If an applicant accepts a position outside of the match during the interview process, you must notify the appropriate match entity (SF Match or NRMP) and the programs to which you have applied of your intent to withdraw from the match. As a courtesy, advise all applied programs of your immediate plans.
8. The Fellowship Match is considered a binding agreement and matched applicants are expected to honor their obligation to the matched fellowship program. Once you accept a position and a contract has been signed, you have made a binding commitment with the institution, pending satisfactory completion of the prerequisite training. Note that there may be consequences for failure to abide by the contract terms.
9. Do not commit to a year of training outside of the fellowship to which you were matched without withdrawing from the match or being released from that program.

Oversight of Fellowship Match Process

All match related comments and complaints should be submitted to the AAOS (bos@aaos.org) and the specialty society which manages the match in question.

Adult Reconstruction and Musculoskeletal Oncology Fellowship Match Program Code of Conduct

Regarding Application Process:

1. Advise all applicants of receipt of their completed application by email, phone or mail.
2. Extend interview invitations, rejections or wait list status to applicants within 30 days of the application close date.

Regarding Interview Process:

3. Provide a fair interview process for all applicants in attendance. The interview process should include an overview of the program and the opportunity to meet the faculty involved with the fellowship program and any current fellow(s).
4. Provide contact information for current and former fellows, if requested by the applicant.
5. **Do not**, prior to the match, guarantee that an applicant will match at that program.
6. **Never** demand, imply, or mandate a pre-interview or post-interview visit by an applicant as a necessary component in the fellowship selection and/or evaluation process.

After the Interview:

7. **Do not** contact applicants after the interview.
 - a. Thank you notes and emails to applicants are discouraged.
8. **Do not** communicate with an applicant by mail, email or phone to inquire about or influence how the applicant will rank the program.
9. **Do not** communicate with faculty or others at the applicant's current program regarding the applicant's rank, or to provide feedback regarding the applicant's status at the fellowship program after the interview.

Oversight of Fellowship Match Process

All match related comments and complaints should be submitted to AAHKS (aahksstaff@aaahks.org) and/or the AAOS (bos@aaos.org).

Adult Reconstruction and Musculoskeletal Oncology Fellowship Match Applicant Code of Conduct

Regarding Application and Interview Scheduling Process:

1. Recognizing that only a limited number of interview slots are available at any given fellowship, applicants should only accept interviews at programs in which they are very interested. **Once accepted, an interview should not be cancelled, unless absolutely necessary.**
2. If an applicant needs to cancel an interview, then the applicant should notify the fellowship program as soon as possible. At least two weeks' notice of cancellation is requested so that the program may invite another applicant with sufficient time. Confirm that the program has received notice of your cancellation via email or by phone call.
 - a. Applicants should be aware that the fellowship program, at its discretion, may communicate with the applicant's residency director if the fellowship program considers that the cancellation was given without sufficient notice or for an unacceptable reason.
3. Applicants should ask all fellowship program related questions at the interview to avoid post-interview communication.

After the Interview:

4. **Do not** ask the program director, faculty or attendings how you will be ranked at any time or contact the fellowship program to express an interest in the program after an interview.
 - a. Thank you notes and emails are discouraged.
5. Applicant questions regarding program logistics and due diligence which come up after the completion of the interview should be directed to the program coordinator, not to the program director, faculty, or attending physicians. Prohibited topics include applicant interest in fellowship program and rank placement.
6. It is also discouraged for the applicant's residency program faculty to contact the fellowship program faculty after the interview has occurred to express interest on behalf of the resident, or to solicit information on the applicant's rank status.

Regarding Fellowship Match Process

7. If an applicant accepts a position outside of the match during the interview process, you must notify the SF Match and the programs to which you have applied of your intent to withdraw from the match. As a courtesy, advise all applied programs of your immediate plans.
8. The Fellowship Match is considered a binding agreement and matched applicants are expected to honor their obligation to the matched fellowship program. Once you accept a position and a contract has been signed, you have made a binding commitment with the institution, pending satisfactory completion of the prerequisite training. Note that there may be consequences for failure to abide by the contract terms.
9. **Do not** commit to a year of training outside of the fellowship to which you were matched without withdrawing from the match or being released from that program.

Oversight of Fellowship Match Process

All match related comments and complaints should be submitted to AAHKS (aahksstaff@aahks.org) and/or the AAOS (bos@aaos.org).

Appendix A

Code of Conduct For Orthopaedic Foot and Ankle Fellowship PROGRAMS

1. Shall advise each applicant of receipt of his/her application.
2. Shall not demand, imply, nor mandate a pre-interview visit by an applicant as a necessary component in the fellowship selection and/or evaluation process.
3. Shall extend interview invitations, rejections or wait list status to applicants within 35 days of the individual program's application close date, which should allow adequate time for the program to process all applications. An applicant on a program's wait list should be notified that his/her application has been received and that he/she will be informed regarding an interview as soon as possible. Applicants who apply late may be considered at the program's discretion.
4. Shall not suggest or imply in any way that the applicant communicate with the program after the date of the applicant's formal interview.
5. Shall not communicate by mail, electronically or phone call with applicants after the interview except under certain circumstances listed below. The goal of this policy is to avoid any perception of impropriety regarding the match process.
 - a. If an applicant contacts the program and the program would like to respond, the program's response must be in writing and sent to all applicants to the program.
 - b. If there is new or additional information that the program feels would be beneficial for the applicants, it should be sent in writing to all applicants to the program.
 - c. If the applicant decides after a telephone interview or an off-site interview (such as at the AAOS meeting) that he/she wants to visit the program to see the facilities, the applicant is allowed to do so and to talk to fellowship faculty as if it is the principal interview.
 - d. It is acceptable for an applicant to contact a non-physician fellowship coordinator to ask routine logistical questions by phone or email. The program should keep a record of these communications and their nature.
6. Shall not ask an applicant about where he/she intends to rank ANY fellowship program, shall not seek assurances from any applicant as to his/her intent to "rank" a fellowship program in a certain order, and shall similarly not state or imply in any way that the applicant's position on the program's match rank list is at all dependent upon the applicant's relative level of interest in the fellowship program.
7. Shall provide a fair interview process to include an overview of the program, the chance to meet the faculty and current fellow(s) and residents involved during the fellowship year, expected experience (clinical, research, and teaching), salary and other logistical information. The program should also provide contact information for current and past fellows.

Approved, AOFAS Board of Directors, 5/6/12

Item #2 recommended by BOS; Approved, Fellowship Match Committee, 3/17/17

**Code of Conduct For
Orthopaedic Foot and Ankle Fellowship APPLICANTS**

1. The application and related materials should be filled out accurately and honestly. Failure to do so may result in the applicant not being allowed to participate in the Foot and Ankle Fellowship Match or to complete a fellowship obtained under false pretenses.
2. Interview Etiquette:
 - a. An applicant should only accept those interview invitations in which he/she intends to actually participate. Accepting an interview and then cancelling it may deprive another deserving applicant of a chance to have an interview.
 - b. If an applicant needs to cancel an interview, he/she should contact the program as soon as possible by telephone or email and consider explaining the reason for the cancellation.
3. An applicant should not ask a program how he/she will be ranked.
4. Once an applicant matches at a fellowship program, he/she should honor that commitment and should not commit to any alternative training during the duration of the fellowship.
 - a. Any extenuating circumstances may be considered by the matched program, and a mutual agreement may be reached regarding release from a matched program. The AOFAS should be informed of this arrangement and the reasons for not matriculating or completing the matched fellowship.
 - b. If an applicant submits a rank list to more than one subspecialty match, the applicant must accept and hold the position to which he/she matched first. The applicant should withdraw from any subsequent matches. This will happen automatically only if all the rank lists were submitted to subspecialty matches administered by the SF Match.
5. If an applicant drops out of the Foot and Ankle Fellowship Match for any reason, the applicant should notify the AOFAS, SF Match, and the programs to which he/she has applied within 5 business days of the decision to withdraw.
 - a. If the applicant accepts a program outside of the Foot and Ankle Fellowship Match, the applicant is to inform the AOFAS of the outside fellowship program that he/she has accepted.
 - b. If the applicant decides to drop out of the Foot and Ankle Fellowship Match for any other reason, including matching in another subspecialty, he/she should provide an explanation to the AOFAS.
6. All match-related comments and complaints should be submitted to both the AOFAS and the SF Match.
7. Applicants who elect to write to a fellowship program either in print or electronically following an interview should understand that the fellowship faculty members are not allowed to respond to individual applicants without distributing that response to all applicants to that program. A non-physician fellowship coordinator may answer routine logistical questions.

Approved, AOFAS Board of Directors, 5/6/2012

Orthopaedic Trauma Fellowship Match Codes of Conduct

CODES OF CONDUCT FOR FELLOWSHIP PROGRAMS

1. Shall advise all applicants of receipt of their application.
2. Shall extend interview invitations, rejections or wait list status to applicants within 30 days of the application close date (The 30 day window will commence 5 business days from the Application Close date. This allows the match programs to process all applications). Those applicants on a program's wait list should be notified that their application has been received and that they will be informed regarding an interview as soon as possible.
3. Shall not pressure an applicant to reveal its place on the applicant's rank list.
4. Shall not, prior to the match, guarantee an applicant that they will match at that program.
5. Shall provide a fair interview process to include an overview of the program; chance to meet the faculty, current fellow(s) and residents involved during the fellowship year. This is in recognition of the time and money an applicant spends to attend an interview. The program should also provide contact information for current and past fellows.
6. Shall not demand, imply, nor mandate a pre-interview visit by an applicant as a necessary component in the fellowship selection and/or evaluation process.

CODES OF CONDUCT FOR RESIDENTS APPLYING FOR FELLOWSHIPS

1. Interview Etiquette:
 - It is recommended that the residents not cancel interviews. He/she should only accept those interview invitations that he/she intends to go on. Accepting an interview spot and then cancelling deprives another deserving applicant of a chance to have an interview.
 - If a resident needs to cancel an interview, he/she should contact the program as soon as possible and include an explanation in writing, of why he/she is cancelling the interview. The applicant should also confirm that the program has received notice of his/her cancellation through electronic mail and/or telephone.
2. If a resident accepts a position outside of the match he/she must notify the appropriate match entity (SF Match, NRMP or ASES), and the programs he/she has applied to, of the intent to withdraw from the match. The applicant should indicate what his/her immediate plans are.

3. An applicant should not commit to another year of training outside of the fellowship where he/she matched, without withdrawing from the match or being released from the program he/she matched at.
4. Applicants cannot ask a program how he/she will be ranked.
5. Once a contract is signed accepting a position, it becomes a binding commitment between the applicant and the institution, upon satisfactory completion of the prerequisite training. Thus, there may be consequences if the applicant does not abide by the signed contract.
6. If an applicant submits a rank list to more than one match then he/she must accept and hold the position of the Match that accepts him/her first.
7. All match related comments and complaints should be submitted to the specialty society that manages the match in question.

For Matches run by SF Match:

It is recognized that not all letters of recommendation are written in a timely manner. If your Match application deadline is approaching and you still do not have all your letters of recommendation, then a letter from you to the SF Match, stating that a letter of recommendation was requested, will allow your application to be completed and processed in time.



Pediatric Orthopaedic Society of North America

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3. Shall not initiate communication by mail, electronically or phone call with applicants after the interview to avoid creating any false sense regarding the match process. Each specialty society has their own set of rules regarding such communications which supersede this code of conduct.
4. Shall not pressure an applicant to reveal its place on the applicant's rank list.
5. Shall not, prior to the match, guarantee an applicant that they will match at that program.
6. Shall provide a fair interview process to include an overview of the program; chance to meet the faculty, current fellow(s) and residents involved during the fellowship year. This is in recognition of the time and money an applicant spends to attend an interview. The program should also provide contact information for current and past fellows.
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6. If an applicant submits a rank list to more than one match then he/she must accept and hold the position of the Match that accepts him/her first.
7. All match related comments and complaints should be submitted to the specialty society that manages the match in question.

For Matches run by SF Match:

It is recognized that not all letters of recommendation are written in a timely manner. If your Match application deadline is approaching and you still do not have all your letters of recommendation, then a letter from you to the SF Match, stating that a letter of recommendation was requested, will allow your application to be completed and processed in time.

SPINE SURGERY FELLOWSHIP MATCH PARTICIPATION AGREEMENT

1.0 Introduction

1.1 Purpose. The Spine Surgery Fellowship Match (“SSFM”) is a program that utilizes a computer-based algorithm developed by San Francisco Match (“SF Match”) to help match medical residents with fellowship appointments in the spine surgery field. The goal of SSFM is to relieve the pressure of uncoordinated appointments and forced early choices on Fellowship Candidates. In order to achieve this goal, Participants in SSFM (both Fellowship Candidates and Fellowship Programs) are obligated to follow the requirements outlined below in this Participation Agreement (“Agreement”).

1.2 Oversight and Enforcement. The North American Spine Society (“NASS”), in consultation with the Cervical Spine Research Society (“CSRS”) and the Scoliosis Research Society (“SRS”), is responsible for overseeing SSFM and the enforcement of the SSFM rules as outlined in this Agreement.

1.3 Definitions. The following terms commonly used in this Agreement shall have the definitions prescribed below:

(a) Applicant: An Applicant is an individual who meets the eligibility requirements set forth in Section 2.1, below.

(b) Fellow: A Fellow is an individual who meets the eligibility requirements set forth in Section 2.2, below.

(c) Fellowship Candidate: Applicants and Fellows are collectively referred to as Fellowship Candidates.

(d) Fellowship Program: A Fellowship Program is an institution offering a position that meets the eligibility requirements of Section 2.3 below, along with the faculty, instructors and Program Director associated with that position.

(e) Affiliated Institution: Hospitals, Outpatient Surgery Centers, Medical School Departments and Divisions, and Medical Practices with which the Fellowship Program participates in the provision of patient care.

(f) Participant: Fellowship Candidates and Fellowship Programs are collectively referred to as the “Participants,” and also individually referred to as a “Participant.”

(g) Match: A Match is the result of the computer-based algorithm that is used to pair the Rank Lists of Fellowship Candidates and Fellowship Programs to place, if applicable, interested Fellowship Candidates with interested Fellowship Programs.

(h) Rank List: A Rank List is a confidential list prepared, in accordance with the procedures and deadlines set by SF Match or the Match Committee (as may be modified from time to time), outlining - in order of preference - the Fellowship Candidates or Fellowship Programs a Participant seeks to be matched with as a result of the SSFM process. **FELLOWSHIP CANDIDATES AND FELLOWSHIP PROGRAMS UNDERSTAND THAT THEY ARE AGREEING TO ENTER INTO A BINDING COMMITMENT WITH ANY ONE OF THE FELLOWSHIP CANDIDATES OR FELLOWSHIP PROGRAMS LISTED ON HIS/HER/ITS RANK LIST, IN THE EVENT OF A MATCH.**

(i) Waiver: A Waiver is a release from the binding commitment of a Match. A Waiver may only be granted by the Match Committee, pursuant to the procedures set forth in Section 5.0.

(j) Vacant Fellowship Position: A Vacant Fellowship Position is one that is left unfilled after the Match of Rank Lists between Fellowship Candidates and Fellowship Programs has occurred.

2.0 Eligibility Requirements

2.1 Applicant Eligibility. In order to participate in SSFM, an Applicant must complete the registration requirements of SF Match, pay all applicable registration and application fees, comply with any other criteria listed on the SF Match Spine Fellowship Web site each year, and be reasonably expected to meet the Minimum Fellowship Eligibility Criteria outlined in section 2.2 below by the scheduled starting date of the Fellowship Program to which they are applying.

2.2 Fellow Eligibility. A Fellow must meet the following criteria prior to the scheduled start date of his/her training with a Fellowship Program: (a) have completed, in good standing, an Orthopedic Surgery medical resident training program certified by the Accreditation Council for Graduate Medical Education (“ACGME”) and be eligible for Board Certification; (b) be enrolled, in good standing, in a Neurosurgery medical resident training program certified by the ACGME; or (c) for DO or international candidates, meet requirements which are reasonably equivalent to those mentioned in (a) or (b)

(collectively “Minimum Fellowship Eligibility Criteria”). Further, each Fellowship Program may have eligibility requirements in addition to the Minimum Fellowship Eligibility Criteria (“Specialty Eligibility Criteria”). Applicants must check with particular Fellowship Programs to determine if there are Specialty Eligibility Criteria which may apply, and are responsible for meeting any such requirements prior to the start date of the Fellowship Program.

2.3 Fellowship Program Eligibility Requirements. In order to qualify for participation in SSFM as a “Fellowship Program,” the subject program must: (1) provide a minimum of one (1) year post-residency course of training focused in the field of spinal surgery; and (2) have a Program Director that is a member of NASS, CSRS, or SRS.

3.0 Fellowship Candidate Responsibilities. In addition to the obligations outlined elsewhere in this Agreement, Fellowship Candidates have the following responsibilities as Participants in the SSFM program:

3.1 Fellowship Candidates must promptly comply with the deadlines and procedures of SSFM, as established (and may be modified from time to time) by SSFM, SF Match and the Match Committee.

3.2 Fellowship Candidates shall be truthful in their communications with Fellowship Programs, SF Match and/or the Match Committee, including accurately representing his/her qualifications for a Fellowship Program.

3.3 Fellowship Candidates agree to cooperate with SF Match, the Match Committee and/or Fellowship Programs to carry out the purpose and intent of this Agreement, including but not limited to, the delivery of information and records and the execution of such documentation reasonably required.

3.4 Fellowship Candidates shall not expect a Fellowship Program to reveal how he/she will be ranked.

3.5 Fellowship Candidates shall not communicate with Fellowship Programs after the interview but before the release of Match results, other than:

- a. a brief communication (letter or email) providing the Fellowship Candidate with feedback regarding the interview and program, and/or requesting similar feedback from the Fellowship Program;
- b. in order to provide any additional documentary information requested by the Fellowship Program at the time of or after the interview; or

c. in order to withdraw the Fellowship Candidate's application to the Fellowship Program.

3.6 Fellowship Candidates shall not disclose their Rank List prior to the release of the Match results.

3.7 FELLOWSHIP CANDIDATES RECOGNIZE THAT A MATCH IS A BINDING COMMITMENT. FAILURE TO FULFILL A MATCH MAY SUBJECT THE FELLOWSHIP CANDIDATE TO SANCTIONS, PURSUANT TO SECTION 8.0, UNLESS A WAIVER IS OBTAINED, PURSUANT TO SECTION 5.0, BELOW.

3.8 Fellowship Candidates recognize that if he/she fails to honor a Match, the Fellowship Candidate cannot, for a period of one (1) year after the date on which the Match Fellowship Program was set to begin, accept alternate employment of any kind with any institutions that sponsor Fellowship Programs that participate in SSFM, or any Affiliated Institutions unless the Fellowship Candidate first obtains a Waiver, pursuant to Section 5.0.

3.9 Fellowship Candidates agree to conduct themselves in an ethical and professional manner with regards to SSFM.

4.0 Fellowship Program Responsibilities. In addition to the obligations outlined elsewhere in this Agreement, Fellowship Programs have the following responsibilities as Participants in SSFM:

4.1 Fellowship Programs must promptly comply with the deadlines and timelines of SSFM, as set (and may be modified from time to time) by SSFM, SF Match and the Match Committee.

4.2 Fellowship Programs shall be truthful in their communications with Fellowship Candidates, SF Match, and/or the Match Committee.

4.3 Fellowship Programs agree to cooperate with SF Match, the Match Committee, and/or Fellowship Candidates to carry out the purpose and intent of this Agreement, including but not limited to the delivery of information and records and the execution of such documentation reasonably required.

4.4 Fellowship Programs shall not ask, or otherwise pressure, a Fellowship Candidate to reveal how the Fellowship Program will be ranked.

4.5 Fellowship Programs shall not communicate with Fellowship Candidates after the interview, but before the release of the results of the Match, other than:

- a. a brief communication (letter or email) providing feedback regarding the interview and the Fellowship Candidate's potential for matching with the Fellowship Program, provided that such communications are unilateral, voluntary and unconditional; or
- b. in order to request additional documentary information as part of the Fellowship Candidate's application.

4.6 Fellowship Programs shall not, prior to the release of the results of the Match, disclose its Rank List or guarantee a Fellowship Candidate that he/she will be provided a position.

4.7 FELLOWSHIP PROGRAMS ACKNOWLEDGE THAT A MATCH IS A BINDING COMMITMENT. FAILURE TO HONOR A MATCH MAY SUBJECT THE FELLOWSHIP PROGRAM TO SANCTIONS, PURSUANT TO SECTION 8.0, UNLESS A WAIVER IS OBTAINED, PURSUANT TO SECTION 5.0, BELOW.

4.8 Fellowship Programs shall not offer employment positions to any Fellowship Candidate prior to the date that Match results are released, and shall not discuss or interview Fellowship Candidates for any such positions prior to the deadlines set by the Match Committee for doing so.

4.9 Fellowship Programs shall only offer positions within its Fellowship Program through SSFM.

4.10 Fellowship Programs and their Affiliated Institutions (defined in Section 1.3) shall not discuss or offer any type of Fellowship position or any other employment positions to any Fellowship Candidate who has failed to honor his/her Match to another Fellowship Program without first obtaining a Waiver, pursuant to Section 5.0. This prohibition of employment shall continue for one (1) year after the date on which the subject Fellowship Candidate's Match was set to begin. It should be noted that sanctions applicable a Fellowship Program by this Section 4.10 also apply to potential employment by Affiliated Institutions, even if those Affiliated Insitutions are not specifically part of SSFM.

4.11 Fellowship Programs shall publish any Specialty Eligibility Criteria that Fellowship Candidates are expected to meet on the SF Match web site prior to the date that Fellowship Candidates may begin registering for SF Match.

4.12 If requested, Fellowship Programs shall provide Fellowship Candidates with a copy of the current employment contract, similar to one that the Fellowship Candidate will be expected to sign in the event of a Match, on or before the date the Fellowship Candidate interviews with the Fellowship Program. Fellowship Candidates acknowledge that the provision of such contracts is intended to clarify the terms of the fellowship and promote discussion between the Participants, and that such contract may change in substance and nature prior to the actual initiation of fellowship.

4.13 Fellowship Programs and Program Directors shall conduct themselves in an ethical and professional manner with regards to SSFM.

4.14 Fellowship Programs shall designate an officer (“Program Director”) who shall be responsible for ensuring the Fellowship Program’s timely compliance with the procedures of SSFM and this Agreement. Note that the Program Director and all surgeons and physicians associated with the Fellowship Program shall be subject to sanctions in the event the Fellowship Program fails to follow the rules outlined in this Agreement.

5.0 Waiver Requests

5.1 Binding Commitment. **A MATCH IS A BINDING COMMITMENT ON BOTH THE FELLOWSHIP CANDIDATE AND THE FELLOWSHIP PROGRAM. FELLOWSHIP PROGRAMS AND FELLOWSHIP CANDIDATES ARE NOT AUTHORIZED TO RELEASE EACH OTHER FROM A MATCH; RATHER A RELEASE OF A MATCH MAY ONLY BE MADE BY THE MATCH COMMITTEE, PURSUANT TO THE WAIVER PROVISIONS OUTLINED IN THIS AGREEMENT. PARTICIPANTS UNDERSTAND THAT WAIVERS ARE NOT AUTOMATIC, AND ARE GRANTED IN ONLY RARE CIRCUMSTANCES.**

5.2 Waiver Requests by a Fellowship Candidate. A Fellowship Candidate may request a Waiver from the obligations of a Match if fulfilling the commitment would cause undue personal hardship or if there has been a substantial change in the Fellowship Program. A Fellowship Candidate that desires to request a Waiver must follow the

procedures and timelines for doing so as set by the Match Committee (as may be modified from time to time) and as outlined in this Agreement.

5.3 Waiver Requests by Fellowship Programs. A Fellowship Program may request a Waiver from a Match with a Fellowship Candidate if circumstances beyond its control make it unable to continue to honor their Match commitment. A Fellowship Program that desires to request a Waiver must follow the procedures and timelines for doing so as set by the Match Committee (as may be modified from time to time) and as otherwise outlined in this Agreement.

5.4 Waiver Decisions. The Match Committee may seek input and information from multiple sources, including from other affected Participants (including the non-requesting Fellowship Candidate or Fellowship Program), in deciding whether a request for a Waiver should be granted. However, the decision on whether a Waiver shall be granted is in the sole discretion of the Match Committee, whose decision shall be final, and not subject to review through arbitration or otherwise. The Match Committee shall decide whether to accept or reject a request for a Waiver within fourteen (14) days of when all information pertaining to such a request is received. Fellowship Candidates may not discuss, interview for, or accept another employment position (whether with a Fellowship Program or otherwise) with any institutions who have Fellowship Programs within any SF Match program until a final decision is made by the Match Committee on the Waiver. Likewise, Fellowship Programs may not discuss, interview, or offer any other individuals the subject Fellowship Program position until a final decision is made by the Match Committee on the request for a Waiver.

5.5 Consequences of Waiver Decisions. If the Match Committee decides to grant a request for a Waiver, the Fellowship Candidate is free to accept another position, and the Fellowship Program is free to offer the Fellowship Program as a Vacant Fellowship Position, in accordance with the rules outlined in Section 7.0. The Match Committee will not pursue sanctions pursuant to Section 8.0 of this Agreement in the event a Waiver is granted; however, the Match Committee's granting of a Waiver has no bearing on any contractual penalties the Parties may owe to each other outside of this Agreement.

6.0 Withdrawals

6.1 Voluntary Withdrawals by Fellowship Candidates. A Fellowship Candidate may withdraw from SSFM at any time before his/her Rank List is submitted.

6.2 Voluntary Withdrawals by Fellowship Programs. A Fellowship Program may withdraw its position(s) from SSFM at any time before the date (as set by the Match Committee, and may be modified from time to time) that Applicants may begin registering for SSFM. A Fellowship Program may withdraw its positions from SSFM after Applicants begin registering for the SSFM, only with the permission of the Match Committee, which will not be unreasonably withheld. In such event, the Fellowship Program is responsible for informing SF Match, the Match Committee, and all Applicants who have applied to that Fellowship Program. The Fellowship Program is also responsible for handling all requests for refunds from Applicants who have applied to the Fellowship Program.

6.3 Involuntary Withdrawals of Fellowship Candidates. In the event that the Match Committee becomes aware that a Fellowship Candidate has violated this Agreement or is not intending to fulfill his/her commitment to a Match, the Match Committee has the authority to withdraw the Fellowship Candidate from SSFM for the remainder of that match cycle, and/or prohibit the Fellowship Candidate from participating in future SSFM cycles. The Match Committee shall not withdraw a Fellowship Candidate pursuant to this paragraph, unless – after providing the Fellowship Candidate a reasonable opportunity under the circumstances to explain his/her position – the Match Committee determines, in its sole discretion, that the Fellowship Candidate has violated this Agreement or is not intending to fulfill his/her commitment to a Match. In the event of such an involuntary withdrawal by the Match Committee, the Fellowship Program (if any) where the subject Fellowship Candidate was matched will automatically be granted a Waiver pursuant to Section 5.0. An involuntary withdrawal is in addition to any authority to sanction Fellowship Candidates pursuant to Section 8.0 below.

6.4 Involuntary Withdrawals of Fellowship Programs. In the event that the Match Committee becomes aware that a Fellowship Program has violated this Agreement or is not intending to fulfill its commitment to a Match, the Match Committee has the authority to withdraw the Fellowship Program from SSFM for the remainder of that match cycle, and/or prohibit the Fellowship Program from participating in future SSFM cycles.

The Match Committee shall not withdraw a Fellowship Program pursuant to this paragraph, unless – after providing the Fellowship Program a reasonable opportunity under the circumstances to explain its position – the Match Committee determines, in its sole discretion, that the Fellowship Program has violated this Agreement or is not intending to fulfill her/her commitment to a Match. In the event of such an involuntary withdrawal by the Match Committee, the Fellowship Candidate (if any) that was matched with the subject Fellowship Program will automatically be granted a Waiver pursuant to Section 5.0. An involuntary withdrawal is in addition to any authority to sanction Fellowship Programs and/or Program Directors pursuant to Section 8.0, below.

6.5 Automatic Withdrawals of Fellowship Candidates. Fellowship Candidates recognize that in the event he/she is registered for multiple fellowship match programs through SF Match, the Fellowship Candidate must accept the first Match he/she receives, and that the Fellowship Candidate will automatically be withdrawn from all other match programs within SF Match once a Match occurs.

7.0 Vacant Fellowship Positions.

7.1 Direct Negotiations. A Vacant Fellowship Position is one that is left unfilled after the Match of Rank Lists between Fellowship Candidates and Fellowship Programs has occurred. This position may be filled by direct negotiations between the Fellowship Program and Fellowship Candidates.

7.2 Binding Commitment. Once a Vacant Fellowship Position is offered and accepted, it becomes a binding commitment, subject to the satisfactory completion of the Minimum Fellowship Eligibility Criteria, along with any Specialty Eligibility Criteria set by the Fellowship Program. Once such an offer is made and accepted, a copy or notice of the acceptance or agreement (whether formal or informal) must be sent to the Match Committee within one week of the acceptance or agreement. Failure to honor a commitment made to a Vacant Fellowship Position, unless a Waiver is obtained, may subject the violating Fellowship Program or the Fellowship Candidate to the same sanctions applicable to a Fellowship Program and Fellowship Candidate who Match on the basis of Rank List submission and the subsequent SF Match algorithm, pursuant to Section 8.0.

8.0 Sanctions

8.1 Power to Sanction. In the event the Match Committee learns of information suggesting a violation of this Agreement, the Match Committee is empowered to investigate whether such a violation exists. If the Match Committee determines that such a violation exists, the Match Committee may, in addition to other actions authorized herein, proceed to recommend sanctions against the violating Fellowship Candidate or Fellowship Program, including all faculty, instructors and Program Directors associated with that Fellowship Program.

8.2 Sanction Proceedings. If the Match Committee, pursuant to paragraph 8.1 above, decides that this Agreement has been violated, the Match Committee may file a Complaint against the violating Fellowship Candidate, Fellowship Program, and/or Program Directors with the NASS Professional Conduct and Ethics Committee (“PCEC”), indicating the nature of the violation and any recommended sanctions. The PCEC will be charged with confirming whether a violation of this Agreement occurred and whether the recommended sanctions are appropriate. The procedures and rules of the PCEC, as may be modified from time to time, shall govern any sanctions proceedings for violations of this Agreement. In the event of a conflict between the rules and procedures of the PCEC and this Agreement, the rules of this Agreement shall govern.

8.3 Consent to Jurisdiction before NASS’ PCEC. **THE PARTICIPANTS AGREE THAT BY ENTERING INTO THIS AGREEMENT AND PARTICIPATING IN SSFM THEY ARE AGREEING TO SUBMIT TO THE JURISDICTION AND PROCEDURES OF THE PCEC, WHICH ARE AVAILABLE AND MAY BE VIEWED ON NASS’ WEB SITE, WWW.SPINE.ORG. PARTICIPANTS FURTHER AGREE TO ABIDE BY THE DECISIONS OF THE PCEC, INCLUDING ITS DECISIONS REGARDING SANCTIONS, REGARDLESS OF THE PARTICIPANT’S STATUS AS A MEMBER OF NASS, CSRS, OR SRS.**

8.4 Available Sanctions. In the event the PCEC determines, in accordance with the procedures outlined above, that a Participant has violated this Agreement, the PCEC has the authority to impose sanctions against the violating Participant, which may include – but is not limited to – the following:

- Prohibition from membership in NASS, CSRS, and/or SRS;
- Prohibition from presenting or moderating at any meetings sponsored by NASS, CSRS, and/or SRS;
- Prohibition on receiving any research funding from NASS, CSRS, and/or SRS;
- Ban from SSFM, and possibly from other non- spine SF Match programs;
- Publication of individually- identified sanctions by NASS, CSRS, and/or SRS;
- Written reprimand or other letter outlining concerns, which may be published by NASS, CSRS, and/or SRS, or filed with the American Board of Medical Specialties, the American Board of Orthopaedic Surgery, the American Board of Neurological Surgery, and/or the ACGME, or the equivalent certifying body for DO candidates or any other entity or individual the PCEC deems relevant, including potential employers of the violating participant; or
- Any other sanctions that the PCEC deems relevant and proper.

The above prohibitions and bans may be time-limited or permanent, at the discretion of the PCEC.

9.0 Match Committee

9.1 Match Committee Responsibilities. The Match Committee is responsible for assisting NASS, CSRS and SRS in the administration and enforcement of the SSFM rules and procedures as outlined in this Agreement.

9.2 Match Committee Members. The Match Committee shall be comprised of four (4) members, each appointed by the NASS Resident & Fellow Committee, in consultation with CSRS and SRS.

9.3 Match Committee Chairperson. The Match Committee will elect a Chairperson from amongst its four members.

9.4 Terms. The members and chairperson of the Match Committee shall serve for a three (3) year term, unless removed or reappointed.

10.0 Disclaimers

10.1 No Guarantee of a Match. Fellowship Candidates acknowledge that participation in SSFM does not provide any guarantees that they will be matched with any particular Fellowship Program, or any Fellowship Programs at all. Fellowship Programs, likewise, acknowledge that participation in SSFM does not provide any guarantees that

they will be matched with any particular Fellowship Candidate or that the Fellowship Program will be matched with any Fellowship Candidate at all.

10.2 Third-Party Processing of Matches. The Fellowship Candidates and Fellowship Programs acknowledge that SSFM utilizes an outside party to process the matching of Rank Lists. SSFM makes no representations or warranties as to the accuracy, completeness, security or reliability of this process.

11.0 Miscellaneous

11.1 Choice of Law and Arbitration. This Agreement shall be construed and interpreted in accordance with the Laws of the State of Illinois. The Participants agree that any controversy or claim arising out of or relating to this Agreement, or the breach thereof, shall be settled by arbitration administered by the American Arbitration Association in accordance with its Commercial Arbitration Rules, and judgment on the award rendered by the arbitrator may be entered in any court having jurisdiction thereof. The place of arbitration shall be Chicago, Illinois. Except as may be required by law, neither a Participant nor an arbitrator may disclose the existence, content, or results of any arbitration hereunder without the prior written consent of the Match Committee.

11.2 Severability. In the event that any one or more of the provisions contained in this Agreement or in any other instrument referred to herein, shall, for any reason, be held to be invalid, illegal or unenforceable in any respect, then to the maximum extent permitted by law, such invalidity, illegality or unenforceability shall not affect any other provision of this Agreement or any other such instrument.

11.3 Limitation on Liability. The Participants acknowledge that the liability of SSFM, NASS, CSRS, SRS, or SF Match (including any of these organizations' members, employees and/or agents) for any violations of this Agreement or the procedures of SSFM are limited to the refund of any fees paid to participate in SSFM.

SPINE FELLOWSHIP MATCH RULES and CODES OF CONDUCT

RULES/ CODES OF CONDUCT FOR RESIDENTS APPLYING FOR FELLOWSHIPS

Residents Applying For Fellowships:

1. Shall abide by the **Spine Surgery Fellowship Match Participation Agreement**, which is attached (linked to) separately.
2. Shall, if a Fellowship Program application deadline is approaching and all letters of recommendation are not complete, write to the SF Match stating that a letter of recommendation was requested so that will the application can be completed and processed and sent to the Fellowship Program in a timely manner.
3. Shall abide by the following Interview Etiquette:
 - It is recommended that residents only accept those interview invitations that he/she intends to go on, and not cancel interviews. Accepting an interview spot and then cancelling deprives another deserving applicant of a chance to have an interview.
 - If a resident needs to cancel an interview, he/she should contact the program as soon as possible and include an explanation, in writing, of why he/she is cancelling the interview. The applicant should also confirm that the program has received notice of his/her cancellation through electronic mail.
4. Shall, if accepting a position outside of the Match, immediately notify the SF Match and NASS (Colleen O'Brien at cobrien@spine.org) of the position which the resident has accepted, and also notify the programs he/she has applied to, of the intent to withdraw from the Match.
5. Shall not ask a Fellowship Program how he/she will be ranked. After an interview is complete, direct communication between the fellowship faculty and the applicant is discouraged. Writing a brief thank you with feedback or comments about the program is acceptable. Further discussion with current or past fellows to better understand a program is appropriate. Additional/ Supplemental application materials is appropriate if warranted, including new or additional references from attendings, if desired. Note that these additional materials may or may not be reviewed, depending on the program's application and interview policies.
6. Shall, if submitting a rank list to more than one subspecialty Match, accept and commit to the position of the Match that accepts him/her first. He/ she must also formally withdraw from any other subspecialty Matching Programs to which he/ she has applied, and must also individually notify all Fellowship Programs at which he/ she has interviewed or has an interview pending, that he/ she has matched in another subspecialty's matching program, and is withdrawing his/ her application from that program.
7. Shall agree to the **Spine Surgery Fellowship Match Participation Agreement**, where exists an explanation of the process for evaluating potential violations of both the Participation Agreement and this Code of Conduct, and where exists the possible sanctions which are applicable when

violations are confirmed by the Match Committee and the NASS Professional Conduct and Ethics Committee.

CODES OF CONDUCT FOR FELLOWSHIP PROGRAMS

Spine Fellowship Programs:

1. Shall abide by the **Spine Surgery Fellowship Match Participation Agreement**, which is attached (linked to) separately.
2. Shall note that only programs participating in the SF Match Spine Surgery Fellowship will be listed on the SF Match and on the NASS Spine Fellowship website.
3. Shall, if the Fellowship Programs is affiliated with a Residency program, strongly discourage residents from applying to fellowship programs not participating in the SF Match process. This may include such measures as writing letters of recommendations only for participating Fellowship Programs.
4. Shall advise all applicants of receipt of their application within five business days of the receipt of the application.
5. Shall extend interview invitations, interview rejections or interview wait list status to applicants within 30 days of the program's application close date. Those applicants on a programs' wait list should be notified that their application has been received and that they will be informed regarding an interview as soon as possible. Note: If a program has a rolling application process, or has an application deadline after January 1st, the applicants shall be notified of their interview status by January 1st or within 30 days of receipt of the completed application, whichever date is later. [Note that due to required processing times, the application may not be submitted to the Fellowship Program by the SF Match for up to 5 days after its completion by the applicant].
6. Shall provide a fair interview process in recognition of the time and money an applicant spends to attend an interview, to include an overview of the program and the chance to meet the faculty, fellow(s), and residents involved during the current fellowship year. The program should also provide contact information for current and past fellows.
7. Shall not pressure an applicant to reveal its place on the applicant's rank list.
8. Shall not, prior to the Match, guarantee an applicant that they will match at that program.
9. Shall agree to the **Spine Surgery Fellowship Match Participation Agreement**, where exists an explanation of the process for evaluating potential violations of both the Participation Agreement and this Code of Conduct, and where exists the possible sanctions which are applicable when violations are confirmed by the Match Committee and the NASS Professional Conduct and Ethics Committee.

All match related comments and complaints should be submitted to the NASS Match Committee, c/o Colleen O'Brien at cobrien@spine.org. (July 2014)

BOS/POSNA Program Survey Questions: Virtual Interviews 2021-2021

1. What is the subspeciality area of your fellowship? A. Trauma B. Adult reconstruction C. Sports medicine D. Shoulder and elbow E. Hand surgery F. Pediatric Orthopedic G. Tumor H. Foot and ankle I. Spine
2. How many fellows do you accept each year?
3. How would you rank your program among other fellowship programs in your subspeciality? A. Upper third B: Middle third C: lower third
4. How many applicants per year have you interviewed on average over the past 5 years?
5. How many applicants did you interview this year?
6. How did you find your applicant pool this year compared to previous years? A. Similar B. More accomplished C. Less accomplished (Any other words to use here?)
7. Have you used virtual interviews before this year? A. Yes B. No
8. Which virtual platform did you use for your interviews? A. Zoom B. Google meet C. Microsoft Team D. GotoMeeting E. Other (Please specify)
 - a. How satisfied were you with the platform? A. Exceptional B. Satisfied C. Not satisfied or dissatisfied D. Dissatisfied
 - b. Would you use it again and/or recommend it to other programs? A. Yes B. No
9. How many interview dates did you have this season?
10. How was the number of interview days different from previous years? A. Less B. More C. The same
11. Did the duration of your interview time change between in person interviews vs. virtual interviews? A: No change B: More time in the virtual interviews C: Less time in the virtual interviews
12. Will you utilize virtual interviews next year even if in person interviews are possible? A. Yes B. No C. Undecided
13. Did you feel that you were able to recognize the applicant's attributes during the interview, or get a true sense for their demeanor/personality, etc? A. Yes B. No C. Undecided
14. Did you have a virtual "social event" before or after your interview dates? A. Yes B. No
15. Did you feel the social event(s) added value to the interview process? A. Yes B. No
16. Please provide any additional feedback on strategies that worked well for the interview process. Comments:
17. Any specific things to avoid or that didn't work optimally? Comments:
18. Did you have any technical glitches that affected your ability to interview? A. Yes B. No
19. Do you think the applicants can get an adequate idea of your fellowship program without an on-site visit A. Yes B. No

20. Did you use a service to help set up your interviews A. Yes B. No
21. Did you produce a video of your program and hospital to show the applicants either prior to the interview or on the day of the interview? A. Yes B. No
22. How do you think the virtual interview season affected your ability to match the best fellows? A. Positive effect B. Negative effect C. No effect

Application-related:

1. Which specialty are you applying to for the 2022-2023 fellowship year? (select all that apply)
 - a. Arthroplasty
 - b. Hand
 - c. Foot and ankle
 - d. Peds
 - e. Shoulder and elbow
 - f. Sports
 - g. Spine
 - h. Tumor
 - i. Other

Due to the pandemic-related virtual interview process this year...

2. Did you apply to more programs than you would have if interviews were in person?
 - a. Yes
 - b. No
 - c. Not sure
3. If you applied to more programs than you would have for in person interviews, how many **more** did you apply to?
 - a. 0-5
 - b. 6-10
 - c. 11-15
 - d. Greater than 15
4. Did you accept more interviews than you would have if they had been in person?
 - a. Yes
 - b. No
 - c. Not sure
5. If you accepted more than you would have for in person interviews, how many **more** did you accept?
 - a. 1-5
 - b. 6-10
 - c. 11-15
 - d. More than 15
6. Did you cancel any interviews after you accepted?
 - a. Yes
 - b. No
7. If yes, how many did you cancel?
 - a. Free text
8. Did you interview at more than one program in one day?
 - a. Yes
 - b. No

Interview-related questions:

9. What percentage of your interviews were on weekdays/during the workday?
 - a. 0-25%
 - b. 26-50%
 - c. 51-75%
 - d. 76-100%
10. Were your interview days mostly continuous (vs broken up, for example AM intro with PM interviews)?
 - a. None were continuous
 - b. <25% of programs were continuous
 - c. 26-50% of programs were continuous
 - d. 51-75% of programs were continuous
 - e. 76-100% of programs were continuous
11. Which do you prefer?
 - a. Continuous
 - b. Broken up
 - c. No preference/depends on the program
12. What platform(s) did you interview on? (select all that apply)
 - a. Zoom
 - b. Microsoft teams
 - c. Skype
 - d. Thalamus
 - e. Other
13. Which worked best?
 - a. Zoom
 - b. Microsoft teams
 - c. Skype
 - d. Thalamus
 - e. Other
14. Why? Free text
15. Did you have any connectivity issues?
 - a. No
 - b. 0-25% of the time
 - c. 26-50% of the time
 - d. 51-75% of the time
 - e. 76-100% of the time
16. If you had connectivity issues, were they on your end or the programs?
 - a. Always me
 - b. Sometimes me, sometimes the program
 - c. Always the program
17. What percent of programs that you interviewed with had some kind of orientation/informational session?
 - a. 0-25%

- b. 26-50%
 - c. 51-75%
 - d. 76-100%
18. For those that did, was it helpful?
- a. Yes
 - b. No
 - c. Not sure
19. What percent of programs that you interviewed with had a live or recorded tour?
- a. None
 - b. <25% of programs
 - c. 26-50% of programs
 - d. 51-75% of programs
 - e. 76-100% of programs
20. For those that did, was it helpful?
- a. Yes
 - b. No
 - c. Not sure/depends on the program
21. What kinds of materials were most helpful in preparation for interviews? Rate between 1-5 (1 being not helpful, 5 being most helpful)
- a. Video overview of program
 - b. Pdf/brochure overview of program
 - c. Updated website
 - d. Virtual tour of facilities
 - e. Transparent case logs
 - f. Current fellows being accessible to talk with before interviews
22. What percent of programs that you interviewed with included a virtual “happy hour” or similar more casual event?
- a. None
 - b. <25% of programs
 - c. 26-50% of programs
 - d. 51-75% of programs
 - e. 76-100% of programs
23. For those that had a happy hour, were faculty present?
- a. No
 - b. <25% of programs
 - c. 26-50% of programs
 - d. 51-75% of programs
 - e. 76-100% of programs
24. For those that had a happy hour, were current fellows present?
- a. No
 - b. <25% of programs
 - c. 26-50% of programs
 - d. 51-75% of programs
 - e. 76-100% of programs

25. For those that had a happy hour, were former fellows present?
 - a. No
 - b. <25% of programs
 - c. 26-50% of programs
 - d. 51-75% of programs
 - e. 76-100% of programs
26. For those that had a happy hour, was it helpful?
 - a. Yes
 - b. No
 - c. Not sure
27. For those that did have a happy hour or informational session, do you prefer:
 - a. Right before interviews (same day/evening)
 - b. The night before interview
 - c. 5-7 days before the interview
28. On the day of the interview, did any of the programs you interviewed with have breakout groups?
 - a. No
 - b. <25% of programs
 - c. 26-50% of programs
 - d. 51-75% of programs
 - e. 76-100% of programs
29. In the breakout groups, were
 - a. Current fellows present –
 - i. Yes
 - ii. No
 - b. Only other candidates
 - i. Yes
 - ii. No
 - c. Faculty
 - i. Yes
 - ii. no
30. For those that had breakout groups, were they helpful?
 - a. Yes
 - b. No
 - c. Not sure
31. Were you able to interact with faculty one-on-one?
 - a. No
 - b. <25% of programs
 - c. 26-50% of programs
 - d. 51-75% of programs
 - e. 76-100% of programs
32. Did you have enough time with each faculty?
 - a. No
 - b. <25% of the time

- c. 26-50% of the time
 - d. 51-75% of the time
 - e. 76-100% of the time
33. How many faculty, on average, did you interview with?
- a. 1-5
 - b. 6-10
 - c. 11-15
 - d. More than 15
34. In your opinion, what is the ideal number of faculty to interview with?
- a. 1-5
 - b. 6-10
 - c. 11-15
 - d. More than 15
35. Did you prefer interviewing with staff 1:1 or multiple faculty:1 applicant per session?
- a. 1:1
 - b. More than 1:1
 - c. Not sure/depends on the program
36. What is the optimal time for an interview room?
- a. 0-10 minutes
 - b. 10-15 minutes
 - c. 15-20 minutes
 - d. 20-30 minutes
 - e. >30 minutes
37. How often did your interview get cut off due to no transparent timer or countdown?
- a. Never
 - b. Not very often
 - c. Sometimes
 - d. Often
 - e. Every time
38. Do you prefer:
- a. A solid block of interviews
 - b. Staggered interviews with ability to return to fellow Q and A room between interviews
39. Did you get to meet with current fellow(s)?
- a. 1:1
 - b. In a group
 - c. No, I did not get to meet with current fellow(s)
40. Was it helpful to meet with the current fellow(s)?
- a. Yes, always
 - b. Yes, but only if 1:1
 - c. Yes, but only if in a bigger group
 - d. No
 - e. Not sure/depends on program
41. Did you meet any support staff (APPs, admins, OR staff, etc)?

- a. No
 - b. <25% of programs
 - c. 26-50% of programs
 - d. 51-75% of programs
 - e. 76-100% of programs
42. Was it helpful to meet with support staff?
- a. Yes
 - b. No
 - c. Not sure
 - d. Not applicable
43. What things do you wish you had been able to experience that weren't possible due to the virtual format? (select all that apply)
- a. Tour facility
 - b. Experience the city
 - c. Meet face to face with faculty
 - d. Meet face to face with current fellow(s)
 - e. Interact with other applicants
 - f. Other – please list here
44. Were you able to get a “feel” of the programs you were interviewing at?
- a. None
 - b. Very little
 - c. Somewhat
 - d. Mostly
 - e. All of them
45. Did you change your rank list based on inability to travel and see programs in person?
- a. Yes
 - b. No
 - c. Not sure
46. Did you put more weight on programs where you had a personal connection due to the uncertainty regarding a “fit” in the virtual interview setting?
- a. Yes
 - b. No
 - c. Not sure
47. If programs had allowed you the option to travel to their sight this year, would you have gone?
- a. Yes
 - b. No
 - c. Not sure

“Cost” of process:

48. How much money do you think you saved with the virtual process this year?
- a. Nothing
 - b. Up to \$500
 - c. \$500-1,000

- d. \$1000-1500
 - e. \$1500-2000
 - f. \$2000 or more
49. Does your home program offer reimbursement for interview costs?
- a. Yes
 - b. No
 - c. Usually, but not this year due to virtual interviews
50. Do you think the cost savings of virtual interviews is substantial?
- a. Yes
 - b. No
 - c. Not sure
51. Do you think the impact on your training (disruption of rotations for travel time) was significant?
- a. Yes
 - b. No
 - c. Not sure
52. How do you think your educational experience this year was compared to if you had had to travel for interviews?
- a. Better
 - b. Worse
 - c. Same
 - d. Unsure
53. How much time did you have to block from rotations for interviews this year?
- a. 1-2 days
 - b. 3-5 days
 - c. 6-9 days
 - d. More than 10 days
54. How much weekend time did you have to block for interviews this year?
- a. 1-2 days
 - b. 3-5 days
 - c. 6-9 days
 - d. More than 10 days

Overall assessment:

55. Do you think the virtual fellowship interview process negatively affect your match process?
- a. Yes
 - b. No
 - c. Not sure
56. If yes, how? (free text)
57. In the future, would you elect to keep the fellowship interview process virtual?
- a. Yes
 - b. No
 - c. Not sure

58. If you chose yes to questions 57, why? (Choose all that apply)

- a. Money
- b. Time
- c. Clinical duties
- d. Convenience
- e. Awkardness
- f. Social interaction
- g. Experience of travel and networking
- h. Ability to get an accurate feel of a program
- i. Other (fill in)

59. If you chose no to question 57, why? (Choose all that apply)

- a. Money
- b. Time
- c. Clinical duties
- d. Convenience
- e. Awkardness
- f. Social interaction
- g. Experience of travel and networking
- h. Ability to get an accurate feel of a program
- i. Other (fill in)

60. Any final suggestions for the BOS?

Title: Board of Specialty Societies Fellowship Committee How to Find a Job During a Global Pandemic in Your Fellowship Year

Charge Code: 5635

Course Number

Date: Monday, March 22, 2021

Director: Scott Steinmann, MD, FAAOS

Webinar Times: 8:15 to 9:15 pm ET; 7:15 to 8:15 pm CT

Description

Finding a job can be stressful. It represents the culmination of several years of training. The COVID global pandemic has significantly altered the fellowship year and job searches. This webinar will provide useful tips to maximize your opportunities during these trying times, be better prepared for the Zoom interview, learn how to identify job opportunities with minimal opportunity for in person interactions, increase options available and getting started successfully in your job.

Learning Objectives

- The attendee will learn about the options for job settings
- The attendee will be able to identify at least three avenues to begin the job search
- The attendee will be able to utilize tips for a productive Zoom interview
- The attendee will list questions to ask in the negotiating process
- The attendee will learn strategies to optimize their professional image as they get started in their job

7:15 – 7:18 PM	Introduction
7:18 – 7:30 PM	Panel: Job Search Strategies - <i>Scott Steinmann, MD, Moderator</i> The Basics: Your Resume, Cover letter and Known Job Sites <i>Julie Adams, MD</i> The Not so Obvious Resources to Find a Job: Networking Matters <i>Casey Humbyrd, MD</i> How to Sell Yourself for a Job: Your Unique Attributes/Interests <i>Andrew J. Schoenfeld, MD, MSc</i>
7:30 – 7:42 PM	Panel: A Peek in the Life of an.... – <i>Lisa Cannada, MD, Moderator</i> Academic Orthopaedic Surgeon <i>Mary Mulcahey, MD</i> Private Practice Orthopaedic Surgeon <i>Jeff Dugas, MD</i> Alternative (hospital) Employment <i>David Hak, MD</i>
7:42 – 7:47 PM	Tips to Shine in a Zoom Interview <i>Cynthia Emory, MD</i>
7:47 – 7:52 PM	The View From the Other Side of the Desk: What an Employer Looks For During an

Interview

Kyle Jeray, MD

7:52 – 7:59 PM

How I Found my Job During the Pandemic

Jana Davis, MD

8:00 – 8:05 PM

Top 10 things you need to start your job

Johnathan Braman, MD

8:05 – 8:10 PM

How to Make a Good First Impression: In the OR, In Clinic and As a Boss (Of MA's/PA's/Residents etc.)

Raffi S. Avedian, MD

8:10 – 8:20 PM

My First Year in Practice

What I learned

Marcella Wolczik, MD

What I would do differently

Brian Wolf, MD

Closing

BOARD OF SPECIALTY SOCIETIES – FELLOWSHIP DIRECTORS’ FORUM
 4:00 – 6:00 p.m. Eastern | Wednesday, March 25, 2020
 Orange County Convention Center | W330 | Orlando, FL

AGENDA

	<u>TOPIC</u>	<u>SPEAKER</u>	
I.	Opening Remarks	Brian Wolf, MD	(5 minutes)
II.	Single Match Day Updates <i>Applications</i> <i>Updated Code of Conduct</i> <i>Communication</i> <i>Position Listings (Website Resources)</i>	Brian Wolf, MD	(15 minutes)
III.	SF Match Update	Dennis Thomatos	(10 minutes)
IV.	Interviews <i>Release Date Discussion</i>	Scott Steinmann, MD	(10 minutes)
V.	Recent Fellow Panel to Review Fellowship Experience	Jessica Hanley, MD Nic Bedard, MD Kyle Duchman, MD	(15 minutes)
VI.	Match Issues Q&A	Open Forum	(15 minutes)
VII.	Surgical Skills Assessment	Larry Field, MD	(10 minutes)
VIII.	Transition into Practice Modules	Christopher Harner, MD	(10 minutes)
IX.	Q&A	Open Forum	(10 minutes)
X.	Future Meeting Date: Wednesday, March 10, 2021		
XI.	Adjourn		
XII.	Networking		

BOS Fellowship Directors’ Forum ~ Objectives

To provide fellowship directors with education and networking opportunities as well as insight into the evolving orthopaedic fellowship process. To provide relationships with external oversight bodies to ensure the quality of orthopaedic education and ultimately patient care.

Marcella R. Woiczik, MD, FAAOS has been a member of the BOS Fellowship Committee since 2019. Dr. Woiczik is a pediatric orthopaedic surgeon at Shriners Hospitals for Children Salt Lake City and Clinical Associate Professor of Orthopaedics at the University of Utah. Dr. Woiczik received her medical degree from the Medical College of Ohio. She completed her orthopaedic surgery residency at the Medical College of Wisconsin and her pediatric orthopaedic fellowship at Primary Children's Hospital and Shriners Hospitals for Children.

Dr. Woiczik specializes in hip conditions, including dysplasia, SCFE and Perthes disease, as well as hip preservation techniques. She provides pediatric fracture care, and also focuses her practice on patients with neuromuscular disorders, and foot and limb deformities. In addition to her clinical practice, Dr. Woiczik participates in pediatric orthopaedic outreach through an annual medical mission to underserved regions in Central America. She is an active member of the Pediatric Orthopaedic Society of North America and the American Academy of Orthopaedic Surgeons. She serves on the University of Utah School of Medicine Admissions Committee. She is also the director of the Pediatric Orthopaedic Fellowship program. Dr. Woiczik's personal interest in pediatric orthopaedics is in treating hip abnormalities in children from infancy into young adulthood, as well as caring for children with club feet and fractures or trauma.

Credentials:

- Medical Degree, Medical College of Ohio
- Orthopaedic Surgery Residency, Medical College of Wisconsin
- Pediatric Orthopaedic Fellowship, Primary Children's Hospital and Shriners Hospitals for Children

Jeffrey R. Dugas, MD, FAAOS has been a member of the BOS Fellowship Committee since 2020. A native of Schenectady, N.Y., Dr. Dugas graduated from North Carolina State University with a bachelor's degree in chemical engineering. He continued his education at Duke University School of Medicine, graduating with his medical degree in 1994. He completed his orthopedic surgery residency at the renowned Hospital for Special Surgery in New York City. Following his orthopedic training, Dr. Dugas accepted a fellowship in sports medicine at the American Sports Medicine Institute (ASMI) in Birmingham, Alabama, under the direction of James R. Andrews, M.D., and William G. Clancy, Jr., M.D.

He was then invited to become a member of the Alabama Sports Medicine & Orthopaedic Center. After its dissolution, he became a partner in the Andrews Sports Medicine & Orthopaedic Center. Additionally, he serves on the Board of Trustees at the American Baseball Foundation (ABF) and American Sports Medicine Institute (ASMI), where he conducts research and serves as Director for the ASMI Sports Medicine Fellowship Program.

Dr. Dugas serves as medical director for USA Cheer, the national governing body for cheerleading, and he is on the National Concussion Task Force for the prevention of concussions in youth sports. In addition, Dr. Dugas serves as Associate Medical Director for World Wrestling Entertainment (WWE). Dr. Dugas also provides sports medicine assistance for the Birmingham Barons, the AA affiliate of the Chicago White Sox and the Alabama Ballet.

Dr. Dugas has contributed significantly to the research of sports medicine. He has published articles and textbook chapters related to injuries of the shoulder and elbow in throwing athletes, vascular injuries in throwers and rotator cuff injuries. He has also published manuscripts on the treatment of knee ligament injuries and the treatment of cartilaginous defects of the knee.

Credentials:

- Medical Degree, Duke University School of Medicine
- Orthopaedic Surgery Residency, Hospital for Special Surgery
- Fellowship, American Sports Medicine Institute

BOS Fellowship Committee

- **Scott P Steinmann, MD, FAAOS** (Vice Chair): Submitted on: 06/15/2020
Acumed, LLC: Paid consultant
American Shoulder and Elbow Surgeons: Board or committee member
American Society for Surgery of the Hand: Board or committee member
Arthrex, Inc: IP royalties; Paid consultant
Arthroscopy Association of North America: Board or committee member
Biomet: IP royalties; Paid consultant
Journal of Hand Surgery - American: Editorial or governing board
Journal of Shoulder and Elbow Surgery: Editorial or governing board
Orthopedics Today: Editorial or governing board
- **Brian R Wolf, MD, FAAOS** (Chair): Submitted on: 10/07/2020
AAOS: Board or committee member
American Orthopaedic Association: Board or committee member
American Orthopaedic Society for Sports Medicine: Board or committee member
Arthrex, Inc: Other financial or material support
CONMED Linvatec: IP royalties; Other financial or material support; Paid consultant; Paid presenter or speaker
Mid America Orthopaedic Association: Board or committee member
Orthopaedic Journal of Sports Medicine: Editorial or governing board
Smith & Nephew: Other financial or material support
SportsMed Innovate: Unpaid consultant
- **Raffi Stephen Avedian, MD, FAAOS** (Member): Submitted on: 03/22/2021
American Orthopaedic Association: Board or committee member
Journal of Bone and Joint Surgery - American: Editorial or governing board
Musculoskeletal Tumor Society: Board or committee member
- **Jeffrey R Dugas, MD, FAAOS** (Member): Submitted on: 10/27/2020
ACGME Task Force: Board or committee member
American Journal of Orthopedics: Editorial or governing board
American Journal of Sports Medicine: Editorial or governing board
American Orthopaedic Society for Sports Medicine: Board or committee member
Arthrex, Inc: IP royalties; Paid consultant; Paid presenter or speaker; Research support
Biomet: Research support
DJ Orthopaedics: Research support
Fellowship Committee: Board or committee member
In2Bones: IP royalties; Paid consultant
Mitek: Research support
Oakstone Publishing: Publishing royalties, financial or material support
Smith & Nephew: Research support
Theralase: Paid consultant; Stock or stock Options
Topical Gear: Stock or stock Options
- **Aaron John Guyer, MD, FAAOS** (Member): Submitted on: 05/06/2020
AAOS: Board or committee member
American Orthopaedic Foot and Ankle Society: Board or committee member
Arthrex, Inc: Paid presenter or speaker
Florida Orthopaedic Society: Board or committee member
Foot and Ankle International: Editorial or governing board

- **Mark R Hutchinson, MD, FAAOS** (Member): Submitted on: 05/24/2020
AAOS: Board or committee member
Am J Sports Med: Editorial or governing board
American Board of Orthopaedic Surgery, Inc.: Board or committee member
American College of Sports Medicine: Board or committee member
American Orthopaedic Society for Sports Medicine: Board or committee member
Arthroscopy Association of North America: Board or committee member
Br J Sports Med: Editorial or governing board
Phys & Sportsmed: Editorial or governing board
- **Madhav A Karunakar, MD, FAAOS** (Member): Submitted on: 01/22/2021
Journal of Orthopaedic Trauma: Editorial or governing board
Orthopaedic Trauma Association: Board or committee member
Osteocentric: Stock or stock Options; Unpaid consultant
Synthes: Paid presenter or speaker
- **Dawn LaPorte, MD, FAAOS** (Member): Submitted on: 07/30/2020
ACGME - Orthopaedic RRC: Board or committee member
American Orthopaedic Association: Board or committee member
American Society for Surgery of the Hand: Board or committee member
Journal of Hand Surgery - American: Editorial or governing board
Ruth Jackson Orthopaedic Society: Board or committee member
- **John C Richmond, MD, FAAOS** (Member): Submitted on: 03/05/2021
Arthroscopy: Editorial or governing board
Carmell Therapeutics: Stock or stock Options
DePuy, A Johnson & Johnson Company: Paid presenter or speaker
Flexion Therapeutics: Paid presenter or speaker
Springer: Publishing royalties, financial or material support
Wolters Kluwer Health - Lippincott Williams & Wilkins: Publishing royalties, financial or material support
- **Andrew J Schoenfeld, MD, FAAOS** (Member): Submitted on: 10/07/2020
AAOS: Board or committee member
Journal of Bone and Joint Surgery - American: Editorial or governing board
North American Spine Society: Board or committee member
Springer: Publishing royalties, financial or material support
Wolters Kluwer Health - Lippincott Williams & Wilkins: Publishing royalties, financial or material support
- **Michael J Taunton, MD, FAAOS** (Member): Submitted on: 05/28/2020
AAOS: Board or committee member
American Association of Hip and Knee Surgeons: Board or committee member
DePuy, A Johnson & Johnson Company: Research support
DJ Orthopaedics: IP royalties; Paid consultant
Journal of Arthroplasty: Editorial or governing board
Mid America Orthopedic Association: Board or committee member
Stryker: Research support
- **Marcella Rae Woiczik, MD, FAAOS** (Member): Submitted on: 03/24/2021
Orthopaediatrics: Paid consultant
Pediatric Orthopaedic Society of North America: Board or committee member

- **Kevin D Plancher, MD, MPH, FAAOS** (Ex-Officio): Submitted on: 03/17/2021
AAOS: Board or committee member
Arthroscopy: Editorial or governing board
Clinical Orthopaedics and Related Research: Editorial or governing board
Episurf: IP royalties
Geislitch: IP royalties
Operative Techniques in Sports Medicine: Editorial or governing board
Techniques in Orthopaedics: Editorial or governing board
- **C Craig Satterlee, MD, FAAOS** (Ex-Officio): Submitted on: 01/13/2021
AAOS: Board or committee member
- **Donna J Malert, CAE** (Staff Liaison): (This individual reported nothing to disclose); Submitted on: 02/04/2021
- **Tracy Sferra** (Staff Liaison): (This individual reported nothing to disclose); Submitted on: 03/02/2021
- **Evette D Thompson** (Staff Liaison): (This individual reported nothing to disclose); Submitted on: 10/07/2020



AMERICAN ACADEMY OF
ORTHOPAEDIC SURGEONS

AMERICAN ASSOCIATION OF
ORTHOPAEDIC SURGEONS

BOARD OF SPECIALTY SOCIETIES

RULES AND PROCEDURES

Approved by:

BOS in October 2018
BOD in December 2018
BOS in October 2019
BOD in December 2019

1.0 NAME

- 1.1 The organization was formed by a resolution of the Board of Directors of the American Academy of Orthopaedic Surgeons (AAOS) on the 17th day of November 1984 as the Council of Orthopaedic Musculoskeletal Specialty Societies (COMSS). In 2007, the Academy's Fellowship approved a bylaws amendment changing the organization's name to the Board of Specialty Societies (BOS).
- 1.2 These rules and procedures shall be supplemented by the BOS Operations Manual, which shall be reviewed on an annual basis and amended by the BOS Executive Committee as necessary.

2.0 PURPOSE

- 2.1 The purpose of the BOS is to bring together the leaders of musculoskeletal specialty societies to address issues of mutual concern and to advise the Board of Directors of the American Academy of Orthopaedic Surgeons and the American Association of Orthopaedic Surgeons (AAOS) of issues which may include, but are not limited to, the format of the AAOS Annual Meeting, continuing medical education, advocacy, musculoskeletal research, graduate medical education, residency and fellowship issues, and other topics that might be identified by other AAOS organizational units and member specialty societies. The BOS also provides opportunities for shared leadership, shared governance, organizational benchmarking, collaborative program development, and communications among member organizations.

3.0 SPECIALTY SOCIETY DEFINITION

- 3.1 An orthopaedic specialty society is a professional organization dedicated to advancing scientific knowledge of the musculoskeletal system, improving care for patients with musculoskeletal disorders, providing education for musculoskeletal professionals, or some combination of these goals. Orthopaedic specialty societies focus on anatomic regions, diseases, or specific disciplines (such as research or education) within the broader field of orthopaedics, and have membership criteria based on interest or competence. Specialty societies are distinguished from orthopaedic-shared interest groups, which are focused more narrowly on a single procedure or anatomic structure, or which limit membership by some shared demographic characteristic of the members such as an alma mater, a geographic region, ethnicity, or gender.

4.0 SPECIALTY SOCIETY MEMBERSHIP

- 4.1 Specialty societies must be elected to the BOS by current BOS member organizations after meeting the membership criteria and applying for membership using the prescribed membership application.
- 4.2 Specialty Society Membership Criteria:
 - 4.2a The specialty society shall be incorporated in the United States of America and have adopted bylaws; the society must be considered "in good standing" by the state in which the society is incorporated.
 - 4.2b The specialty society shall have had regularly scheduled annual meetings for at least five consecutive years.
 - 4.2c The specialty society shall have greater than 50% of its active members who are Fellows of the AAOS, or have a minimum number of 200 orthopaedic surgeons in the specialty society, but in no case have less than 100 members who are AAOS Fellows.

At the discretion of the Board of Specialty Societies, smaller groups of history of participation in the Board of Specialty Societies may continue to participate even the membership falls below the stated criteria. The Board of Specialty Societies leadership will continue to monitor the participation of these legacy societies.

- 4.2d The specialty society shall be primarily involved in advancing scientific knowledge of the musculoskeletal system, improving care for patients with musculoskeletal disorders, providing education for musculoskeletal professionals, or some combination of these goals.

- 4.2e The specialty society represents a recognized body of musculoskeletal knowledge or practice. Evidence of recognition includes one or more of the following characteristics: provides an established journal ; distributes a quarterly newsletter; supports formal training programs in the specialty; supports research initiatives; or receives recognition of the specialty by the American Board of Medical Specialties (ABMS). Evidence of broad basis includes focus beyond a single anatomic structure, procedure, device, or practice concentration. Evidence of differentiation includes relevance to or shared interest with more than one other existing musculoskeletal subspecialty.
- 4.3 Membership Application Procedure:
- 4.3a A specialty society interested in BOS membership shall send documentation of how it meets the membership criteria using the prescribed membership application to the BOS Secretary prior to the BOS business meeting at the AAOS Annual Meeting. The Executive Committee shall review the application. Applicants that meet the criteria in Section 4.2 (Specialty Society Membership Criteria) shall be presented to the BOS at its business meeting during the AAOS National Orthopaedic Leadership Conference (NOLC). The BOS shall vote on the applicant’s membership request at the BOS business meeting during the AAOS Fall Meeting.
- 4.3b Election to the BOS shall be by majority vote of the member organizations present.
- 4.3c Should an organization’s membership application be approved, the BOS will notify the organization within thirty (30) days of the vote by written correspondence. The applicant shall obtain BOS member status at the beginning of the next calendar year.
- 4.3d Should an application be rejected, the BOS will notify the organization within thirty (30) days of the vote by written correspondence. The applicant may reapply for BOS membership no earlier than two (2) years after the rejection decision. The reapplication must be submitted using the prescribed membership application n as outlined in the BOS Operations Manual.
- 4.4 Maintenance of BOS Membership:
- 4.4a A member organization shall maintain its membership consistent with BOS member eligibility.
- 4.4b A member organization shall be required to have representation at all BOS meetings.
- 4.4c Membership eligibility shall be reviewed biennially through a “BOS Organization Review” as outlined in the BOS Operations Manual. Each member organization shall receive a written acknowledgement within thirty (30) days of the completed review.
- 4.5 Membership Probation and Termination
- 4.5a If membership criteria and maintenance deficiencies are identified during the BOS Organization Review, the member organization shall be notified of the deficiencies within thirty (30) days of the completed review by written correspondence.
- 4.5b Should a member organization be deficient, the member organization shall be granted a two (2) year probationary period, with full member organization privileges, to take corrective actions to meet the membership eligibility and maintenance criteria.
- 4.5c If a member organization is found to be ineligible for continuing BOS membership through the BOS Organization Review, and eligibility and maintenance criteria have not been met during the probationary period, the BOS may terminate the organization’s membership by a majority vote of the BOS organizations present at the BOS business meeting during the AAOS Annual Meeting.
- 4.5d A membership organization that is either placed on membership probation or terminated may appeal the BOS decision as outlined in the BOS Operations Manual.
- 4.5e Should a member organization’s membership be terminated and wishes to reapply for membership, the organization shall follow the membership application process as described in Section 4.3.

4.6 Withdrawal

A member specialty society may withdraw from the BOS upon written notice to the BOS Secretary. Such withdrawal shall be effective as of the date of the succeeding BOS business meeting following receipt of notice.

4.7 Representatives

There shall be a minimum of two representatives and a maximum of three representatives appointed from each BOS member organization. At minimum, one society member, who is an AAOS Fellow or Associate, and the executive director shall be required representatives. The AAOS Fellow or Associate shall serve one three-year term and shall be eligible for one additional three-year term. The two AAOS Fellows or Associates shall serve one three-year term and shall be eligible for one additional three-year term.

4.7a Dual Representation

A representative, may represent more than one member organization if he/she is appointed by their respective member organizations using the prescribed membership appointment form.

4.7b Attendance

Attendance at BOS meetings is essential for the BOS to carry out its assigned functions and to be a benefit to member organizations. If a representative is unable to attend an assigned meeting, he/she shall be required to notify the BOS Secretary and provide the reason(s) for the planned absence and provide an alternate. Representatives who fail to attend two consecutive assigned meetings without adequate notice are not eligible for any BOS office or for reappointment as a BOS representative. If the Executive Director/CEO is unable to attend, a society staff member can be assigned as an alternate.

4.7c Other Assigned Duties

Representatives may be appointed to serve on BOS committees and task forces. If these appointments are accepted, representatives shall be expected to attend and participate in these meetings. Failure to attend and participate shall result in the representative's removal from the committee or task force as outlined in the BOS Operations Manual.

4.8 Membership Roster Update

BOS membership rosters will be updated quarterly.

5.0 OFFICERS

5.1 The officers of the BOS shall be Fellows of the AAOS. The BOS will elect its own officers, which shall be a Chair, Chair-Elect, and Secretary, at its fall business meeting. Each officer shall be elected for a one-year term except the Secretary, who may succeed him/herself for an additional one-year term.

5.2 The Chair-Elect shall succeed to the office of Chair immediately upon expiration of the term of office of the Chair or in the event of death, inability, or refusal to act. In the event the Chair-Elect succeeds the office of Chair by reason other than natural succession, the Chair-Elect shall serve the remaining unfulfilled term of the replaced Chair and serve additionally his/her own one-year term of office.

6.0 DUTIES OF THE OFFICERS

6.1 Chair

6.1a Shall preside at all meetings of the BOS and of the Executive Committee.

6.1b Shall serve on the AAOS Board of Directors, the AAOS Executive Committee, the AAOS Committee Appointment Program Committee, the AAOS Unity Review Group, the Political Action Committee of the American Association of Orthopaedic Surgeons, and the AAOS Council on Education.

6.1c Shall report to the AAOS Board of Directors all activities of the BOS and shall keep the BOS members apprised of AAOS deliberations and activities relevant to the orthopaedic community.

- 6.1d Shall appoint, with the approval of the Executive Committee, committee chairs if terms are expiring or vacancies exist, any member to a vacancy in an ad hoc committee, and suggest to the AAOS Committee Appointment Program Committee members for service or liaison service on AAOS Committees.
 - 6.1e Shall be responsible for developing the agenda for meetings, with the assistance of the BOS Chair-elect, Secretary, and AAOS staff in a timely manner.
 - 6.1f Shall serve as an ex-officio member of all special and standing committees of the BOS.
- 6.2 Chair-Elect
- 6.2a Shall assist the Chair in the performance of the Chair's duties and shall substitute for the Chair when he/she is unable to attend to those duties. He/she shall automatically succeed the Chair at the conclusion of the AAOS Annual Meeting.
 - 6.2b Shall serve on the AAOS Board of Directors and shall keep the BOS members apprised of AAOS deliberations and activities relevant to the orthopaedic community.
 - 6.2c Shall serve on the Political Action Committee of the American Association of Orthopaedic Surgeons, and the AAOS Council on Advocacy.
- 6.3 Secretary
- 6.3a Shall prepare the minutes of all meetings of the BOS and its Executive Committee and shall file a copy with the AAOS office for distribution to the BOS and to the Board of Directors of the AAOS.
 - 6.3b Shall lead the annual review process of the BOS Operations Manual and ensure revisions are appropriate and timely.
 - 6.3c Shall afford each BOS member organization an opportunity to add items to the agenda and circulate appropriate background material to them.
 - 6.3d Shall serve on the AAOS Board of Directors and shall keep the BOS members apprised of AAOS deliberations and activities relevant to the orthopaedic community.
 - 6.3e Shall serve on the AAOS Council on Research and Quality.
 - 6.3f He/she shall automatically succeed the Chair-Elect at the conclusion of the AAOS Annual Meeting.
- 6.4 Immediate Past Chair
- 6.4a Shall serve as the chair of the BOS Nominating Committee.
 - 6.4b Shall serve on the AAOS Communications Cabinet and the AAOS Annual Meeting Committee.
- 6.5 Newly-Elected Officers
- 6.5a Shall take their offices at the conclusion of the AAOS Annual Meeting.
 - 6.5b When a BOS representative becomes a member of the BOS Executive Committee, that individual shall resign as a BOS representative of his/her specialty society, thus giving the society the ability to appoint a new BOS representative.

7.0 COMMITTEES

7.1 Committee Structure

The BOS shall have four standing committees and three joint committees with the Board of Councilors (BOC).

7.1a The four standing committees are:

- Executive Committee;
- Executive Director Forum;

- Fellowship Committee; and the
 - Nominating Committee.
- 7.1b The three joint committees with the BOC are:
- BOC/BOS Bylaws Review Committee;
 - BOC/BOS Professionalism Committee; and the
 - BOC/BOS Resolutions Committee.
- 7.1c The Chair, with the approval of the majority of the BOS Executive Committee, may create ad hoc committees, project teams, or task forces as necessary. The Chair has the right to determine the charges and timelines and has the authority to appoint all members.
- 7.2 Executive Committee
- 7.2a The Executive Committee shall be comprised of the Chair, Chair-Elect, Secretary, and the Immediate Past Chair. The Executive Committee shall meet regularly between BOS meetings to administer the affairs of the BOS.
- 7.2b Members of the Executive Committee may vote during any BOS business meeting.
- 7.3 Nominating Committee
- The Nominating Committee shall be chaired by the Immediate Past Chair, and shall be comprised of four additional BOS representatives who are not officers and the chair of the prior year's BOS Nominating Committee. The past Nominating Committee Chair shall participate, though shall not vote. The four members shall be nominated and elected through electronic means. The Nominating Committee members shall be announced at the National Orthopaedic Leadership Conference. No member may serve two consecutive terms on the Nominating Committee.
- 7.3a The Nominating Committee is responsible for selecting at least one nominee for Secretary.
- 7.3b The Committee Chair shall present the candidates for the Secretary position during the BOS business meeting at the AAOS Fall Meeting. The officer shall be selected by a majority vote of the BOS member organizations present.
- 7.3c The Committee shall follow the processes outlined in the BOS Operations Manual, with regards to the identification and recommendation of candidates, which shall include interviewing the candidates and considering their enhanced disclosure information and Plans for Active Management (PAMs) as developed by the AAOS Committee on Outside Interests and whether the PAMs have been accepted by the candidates. The Nominating Committee shall exercise due diligence and transparency throughout the nomination selection process.
- 7.4 BOS Fellowship Committee
- 7.4a This Committee shall consist of a Chair and Vice Chair elected from within the committee membership by a majority vote of the members, and one representative appointed from each of the orthopaedic match programs.
- 7.4b The Chair and Vice Chair shall serve one three-year term and may be re-elected for one additional term. Members shall serve a maximum of two three-year terms.
- 7.4c. Charges of the Committee shall be determined by the BOS Executive Committee and reviewed annually by the Committee Chair and the Executive Committee.
- 7.5 BOS Executive Director Forum
- 7.5a This forum shall consist of a Chair and Vice Chair elected from within the Forum membership by a majority vote of Forum members. The Chair shall not be the executive director of the organization

from which the BOS Chair or BOS Chair-Elect are members. The Forum members shall be the executive directors of each BOS member organization.

- 7.5b The Chair and Vice Chair shall serve for one year, and are eligible for two additional one-year appointments provided he/she remains a BOS representative. Members shall serve through the end of their term on the BOS.
 - 7.5bi The Chair shall preside at all Forum meetings and serve as the BOS liaison to the Executive Committee. The Chair shall execute all duties delegated to him/her by the Executive Committee.
 - 7.5bii The Vice Chair shall preside at all Forum meetings in the event the Chair cannot facilitate a meeting and shall execute all duties delegated to him/her by the Chair or the Executive Committee. He/ she shall succeed to the position of Chair if the Chair is unable or unqualified to serve. Should the Vice Chair fill the position of Chair for any reason, he/she may complete the balance of Chair's term.
- 7.5c Charges of the Forum shall be determined by the BOS Executive Committee and reviewed annually by the Forum Chair and the Executive Committee.
- 7.6 BOC/BOS Bylaws Review Committee
 - 7.6a This committee shall consist of a Chair and members appointed by the BOC Chair-Elect and the BOS Chair-Elect.
 - 7.6b The Chair shall serve for two years and all BOS committee members shall serve through the end of their third year if they so desire.
 - 7.6c Charges of the Committee shall be outlined in the AAOS Bylaws and the processes shall be referenced in the BOS Operations Manual.
- 7.7 BOC/BOS Professionalism Committee
 - 7.7a This committee shall consist of a Chair and members appointed by the BOC Chair-Elect and the BOS Chair-Elect.
 - 7.7b The Chair shall serve for two years and all BOS committee members shall serve through the end of their third year.
 - 7.7c Charges of the Committee shall be outlined in the AAOS Bylaws and the processes shall be referenced in the BOS Operations Manual.
- 7.8 BOC/BOS Resolutions Committee
 - 7.8a This committee shall consist of a Chair and members appointed by the BOC Chair-Elect and the BOS Chair-Elect.
 - 7.8b The Chair shall serve for two years and all BOS committee members shall serve through the end of their term on the BOS.
 - 7.8c Charges of the Committee shall be outlined in the AAOS Bylaws and the processes shall be referenced in the BOS Operations Manual.

8.0 MEETINGS

- 8.1 There shall be three BOS business meetings each year. One meeting will take place at the AAOS Annual Meeting. The second meeting shall take place at the AAOS National Orthopaedic Leadership Conference and the third meeting shall take place at the AAOS Fall Meeting.
- 8.2 **Quorum at Business Meetings**
BOS business may be conducted at business meetings only when a quorum is present. A quorum shall consist of those BOS representatives present and eligible to vote, but in no event shall a quorum consist of less than fifty percent (50%) of the eligible voting BOS representatives. If a quorum is not present, voting shall be done by conference call, whereby a majority of the BOS representatives eligible to vote shall be required or electronically, whereby, a unanimous vote of all of the BOS eligible voting representatives shall be required.
- 8.3 The BOS representatives shall be expected to attend all three meetings, and are responsible for voting on BOS issues, and BOC/BOS Advisory Opinions, AAOS resolutions, amendments to AAOS bylaws, and Standards of Professionalism being considered.
- 8.4 Executive director representatives shall be expected to attend at least two business meetings, including the BOS business meeting at the AAOS Annual Meeting,

9.0 REIMBURSEMENT OF BOS EXPENSES

- 9.1 Representatives shall be eligible for expense reimbursement in accordance with the AAOS Travel Policy and the BOS Operations Manual in effect at the date of travel. Expenses shall be submitted within 30 days of the meeting in order to be reimbursed.

10.0 RULES OF ORDER

- 10.1 All BOS meetings and proceedings shall be conducted according to standard parliamentary procedures that provide for adequate notice and a fair opportunity for debate. The presiding officers may be guided by, but not bound by, the most recent edition of Robert's *"Rules of Order."*

11.0 AMENDMENT

- 11.1 Any proposed amendments to these Rules and Procedures must be submitted to the BOS Executive Committee prior to any BOS business meeting. The Executive Committee shall review the proposed amendment and then place it on the agenda of the next BOS business meeting for consideration and approval by all voting BOS representatives present. At the meeting, BOS representatives will discuss the proposed amendment after which it must be approved by a two-thirds (2/3) vote. To be adopted, the AAOS Board of Directors must approve the revised BOS Rules and Procedures.

AAOS Mandatory Disclosure Policy

Governance Groups (Except Board of Directors), Continuing Medical Education Contributors, Senior Management Team Members, and Others

Philosophy

In order to promote transparency and confidence in the educational programs and in the decisions of the American Academy of Orthopaedic Surgeons and the American Association of Orthopaedic Surgeons (hereinafter collectively referred to as "AAOS"), the AAOS Board of Directors has adopted this mandatory disclosure policy.

The actions and expressions of Fellows or Members providing education of the highest quality or in shaping AAOS policy must be as free of outside influence as possible and any relevant potentially conflicting interests or commercial relationships must be disclosed. Because the AAOS depends upon voluntary service by Fellows and Members to conduct its educational programs and achieve its organizational goals, this disclosure policy has been designed to be realistic and workable.

The AAOS does not view the existence of these interests or relationships as necessarily implying bias or decreasing the value of your participation in the AAOS.

Who Must Disclose

Each participant in the AAOS CME program or author of enduring materials, member of the AAOS Board of Directors, Board of Councilors, Board of Specialty Societies, Councils, Cabinets, Committees, Project Teams or other official AAOS groups (collectively "AAOS governance groups"), editors-in-chief and editorial boards and AAOS clinical practice guidelines, appropriate use criteria and performance measures development workgroups, has the obligation to disclose all potentially conflicting interests. Each participant in the AAOS CME program or author of enduring materials, AAOS governance groups, editors-in-chief and editorial boards and AAOS clinical practice guidelines, appropriate use criteria and performance measures development workgroups must disclose relevant activities or relationships through the AAOS Orthopaedic Disclosure Program.

Responsibility of the Individual Who Discloses

Using a uniform form approved by the AAOS Board of Directors, participants are responsible for providing information to the AAOS Orthopaedic Disclosure Program regarding the nature of their relationships with commercial entities relating to orthopaedics. Participants are responsible for the accuracy and completeness of their information. In addition, participants have an obligation to review and update their personal information in the AAOS Orthopaedic Disclosure Program at least semiannually (usually April and October). It is strongly recommended that participants note any changes to the AAOS Orthopaedic Disclosure Program as soon as possible after they occur. All orthopaedic surgeons are encouraged to participate in the AAOS Orthopaedic Disclosure Program

Consequences for Failing to Disclose

A failure of a required participant to participate in the AAOS Orthopaedic Disclosure Program will result in the participant being asked not to participate in the AAOS CME program, the AAOS governance group, as editor-in-chief or on an editorial board and AAOS clinical practice guidelines, appropriate use criteria and performance measures development workgroups. The most current version of the AAOS Policy for a

Fellow or Member Who Fails to Disclose Conflicts of Interest When Required shall govern all actions taken under this provision..

Public Disclosure of AAOS Orthopaedic Disclosure Program Information

The information in the AAOS Orthopaedic Disclosure Program shall be available to the public and to other AAOS Fellows and Members. In addition, a list of all participants in the AAOS CME program, AAOS governance group or AAOS clinical practice guidelines, appropriate use criteria and performance measures development workgroups, along with their disclosures, will be included in all meeting materials.

Disclosure of Potential Conflicts of Interests at AAOS Governance Meetings

As indicated above, a list of all participants in the AAOS governance group, along with their current disclosures, will be included in all meeting materials.

Participants in AAOS governance groups (except for the Board of Councilors and Board of Specialty Societies) have an obligation to indicate any potential conflicts they may have during discussions affecting their personal interests during the meeting of the AAOS governance group. At each meeting of the AAOS governance group, members of the group will be reminded that full disclosure must be made of any potential conflict of interest when a matter involving that interest is discussed.

The chair of the governance group shall also have the prerogative of requesting a participant to provide further information or an explanation if the chair identifies a potential conflict of interest regarding that participant. The chair shall be guided by the most current version of the Protocol for the President to Use in Handling Potential Conflict of Interest Issues Before the AAOS Board of Directors. Based on the information provided in the AAOS Orthopaedic Disclosure Program and/or upon a further review, the chair of the AAOS governance group may determine that the participant shall:

- Disclose the potential conflict and continue to participate fully in the AAOS governance group's discussions and vote; ["Disclosure Option"]
- Disclose the potential conflict, address any questions other members of the group have on the subject, then leave the room and not participate in further discussion and vote ["Recusal from Vote option"] or
- Depart from the room until the matter has been fully discussed and acted upon. ["Recusal from Discussion and Vote option"].

If one of these actions is taken, it should be reflected in the minutes of the AAOS governance group's meeting.

Adopted: February 2007; Revised: December 2009; February 2012

AAOS ANTITRUST REMINDER

Discussions at meetings of the American Academy of Orthopaedic Surgeons and the American Association of Orthopaedic Surgeons (collectively “AAOS”) often cover a broad range of topics pertinent to the interests or concerns of orthopaedic surgeons. The purpose of the Reminder is to alert AAOS members and staff to the kinds of activities most likely to raise antitrust concerns and to the precautions that must be taken to avoid potential antitrust problems.

As a general rule, except as noted below, discussions at AAOS meetings can address virtually any topic without raising antitrust concerns if the discussions are kept scrupulously free of even the suggestion of private regulation of the profession. However, a number of topics that might be (and have been) discussed at AAOS meetings may raise significant complex antitrust concerns. These include:

- Membership admissions, rejections, restrictions, and terminations;
- Professional compliance actions – reprimands, censures, suspensions and expulsions;
- Adoption of and revisions to Standards of Professionalism;
- Method of provision and sale of AAOS products and services to non-members;
- Restrictions in the selection and requirements for exhibitors at the AAOS Annual Meeting or in CME activities;
- Collecting and distributing certain orthopaedic practice information, particularly involving practice charges and costs;
- Obtaining and distributing orthopaedic industry price and cost information;
- Professional certification programs;
- Group buying and selling; and
- Inclusions or exclusion of other medical societies in organizational activities or offerings.

When these and related topics are discussed, the convener or members of the AAOS group should seek counsel from the AAOS Office of General Counsel.

AAOS staff has been trained to identify potential antitrust matters. The AAOS relies on the judgment of its staff regarding these matters. AAOS urges its Board, committees and other groups not to participate in discussions that may give the appearance of or constitute an agreement that would violate the antitrust laws.

Notwithstanding this reliance, it is the responsibility of each AAOS Board or committee member to avoid raising improper subjects for discussion. This reminder has been prepared to ensure that AAOS members and other participants in AAOS meetings are aware of this obligation.

The “Do Not’s” and “Do’s” presented below highlight only the most basic antitrust principles that may come before medical associations, like AAOS. AAOS members and staff participating in AAOS meetings should consult with the AAOS Office of General Counsel in all cases involving specific questions, interpretations or advice regarding antitrust matters.

Do Nots

1. Do not, in fact or appearance, discuss or exchange information regarding:
 - a. Individual company prices, price changes, price differentials, mark-ups, discounts, allowances, credit terms, etc. or any other data that may bear on price, such as costs, production, capacity, inventories, sales, etc.
 - b. Raising, lowering or “stabilizing” orthopaedic prices or fees;
 - c. What constitutes a fair profit or margin level;
 - d. The availability of products or services;
 - e. The allocation of markets, territories or patients.
2. Do not suggest or imply that AAOS members should or should not deal with certain other persons or firms.
3. Do not suggest or imply that AAOS compliance standards, guidelines, measures or other resources should favor some members or practices and/or disadvantage others.
4. Do not foster unfair practices regarding advertising, standardization, certification or accreditation.
5. Do not discuss or exchange information regarding the above matters during social gatherings, incidental to AAOS-sponsored meetings.
6. Do not make oral or written statements on important issues on behalf of AAOS without appropriate authority to do so.

Do

1. Do adhere to prepared agenda for all AAOS meetings, ideally distributed in advance. Agendas should be sufficiently detailed to disclose the nature of the discussions to be held. It is generally permissible for agendas to include discussions of such varied topics as professional economic trends, advances and problems in relevant technology or research, various aspects of the science and art of management, and relationships with local, state or federal governments.
2. Do require that a member of the AAOS professional staff participate in every AAOS meeting, either in person or by conference call. If any meeting is expected to deal with sensitive competitive issues, counsel from the AAOS Office of General Counsel should ordinarily be present. Committee staff should consult with AAOS legal counsel to determine whether the presence of counsel is advisable. If AAOS legal counsel is not at the meeting, members and staff should not hesitate to consult the AAOS Office of General Counsel as necessary.
3. Do ensure that a record of all meetings, consisting of formal minutes or a memo to the file, should be made by AAOS committee staff.
4. Do object whenever meeting summaries do not accurately reflect the matters that occurred.
5. Do consult with AAOS counsel on all antitrust questions relating to discussions at AAOS meetings.
6. Do object to and do not participate in any discussions or meeting activities that you believe violate the antitrust laws; dissociate yourself from any such discussions or activities and leave any meeting in which they continue.

Special Guidelines for Collecting and Distributing Information

The collection and distribution of information regarding business practices is a traditional function of associations and is well-recognized under the law as appropriate, legal and consistent with the antitrust laws. However, if conducted improperly, such information gathering and distributing activities might be viewed as facilitating an express or implied agreement among association members to adhere to the same business practices. For this reason, special general guidelines have developed over time regarding association's reporting on information collected from and disseminated to members. Any exceptions to these general guidelines should be made only after discussion with the AAOS Office of General Counsel. These general guidelines include:

1. Member participation in the statistical reporting program is voluntary. The statistical reporting program should be conducted without coercion or penalty. Non-members should be allowed to participate in the statistical reporting program if eligible; however, if there is a fee involved, they may be charged a reasonably higher fee than members.
2. Information should be collected via a written instrument that clearly sets forth what is being requested.
3. The data that is collected should be about past transactions or activities; particularly if the survey deals with prices and price terms (including charges, costs, wages, benefits, discounts, etc.), it should be historic (more than three months old).
4. The data should be collected by either the AAOS or an independent third party not connected with any one member.
5. Data on individual orthopaedic surgeons should be kept confidential.
6. There should be a sufficient number of participants to prevent specific responses or data from being attributable to any one respondent. As a general rule, there should be at least five respondents reporting data upon which any statistic or item is based, and no individual's data should represent more than 25% on a weighted average of that statistic or item.
7. Composite/aggregate data should be available to all participants – both members and non-members. The data may be categorized, e.g., geographically, and ranges and averages may be used. No member should be given access to the raw data. Disclosure of individual data could serve to promote uniformity and reduce competition.
8. As a general rule, there should be no discussion or agreement as to how members should adjust, plan or carry out their practices based on the results of the survey. Each member should analyze the data and make business decisions independently.

CONCLUSION

This reminder has been written to avoid any violation of the law by AAOS members and staff and any activity that might give the appearance of illegality. However, no set of guidelines can address every possible type of inappropriate or unlawful activity. AAOS members and staff should use careful judgment to identify situation where AAOS activities, or discussions at AAOS-sponsored meetings, may violate federal or state law or may be perceived as doing so. In those cases, it is the responsibility of the member and staff to avoid these situations and consult with the AAOS Office of General Counsel when necessary.

Adopted: June 2005
Revised: December 2014; May 2019

ANTI-DISCRIMINATION AND ANTI-HARASSMENT POLICY AND PROCEDURES

AAOS also prohibits harassment or discrimination in any form by any person(s) attending or otherwise participating in AAOS-sponsored events, meetings or social gatherings. AAOS is committed to providing an environment that is free from all forms of discrimination and harassment, including but not limited to those based on race, color, creed, religion, national origin, ancestry, sex, sexual orientation, gender identity or expression, disability, age, marital status, status regarding public assistance, veteran or military service status, or any other legally protected status.

This AAOS Policy sets the expectations for the behavior of all members, meeting attendees, guests, exhibitors, vendors and suppliers (referred to as Attendees) and applies to all AAOS Activities, whether in person or virtual, including but not limited to during

- the creation or delivery of work products on behalf of AAOS;
- any AAOS business interaction;
- meetings hosted by AAOS, including the Annual Meeting;
- conferences, seminars or courses;
- any meeting of any AAOS entity including the Boards, committees and subcommittees, and
- all ancillary or unofficial social events held in conjunction with any AAOS meeting.

1. Unacceptable Behavior. Discrimination or harassment by any person against another person, regardless of his/her role with AAOS, constitutes unacceptable behavior and will not be tolerated. Unacceptable behaviors may include:

- a) Unwelcome and uninvited attention or contact;
- b) Verbal or written comments, or visual images, that are sexually suggestive; denigrate or show hostility or aversion toward an individual, or group of individuals; create an intimidating, hostile, or offensive environment; or unreasonably interfere with an individual's ability to participate in AAOS Activity;
- c) Intimidating, harassing, abusive, discriminatory, derogatory or demeaning speech or actions in any context during an AAOS Activity;
- d) Harmful or prejudicial verbal or written comments or visual images related to gender, sexual orientation, race, religion, disability, age, appearance, or other personal characteristics;
- e) Deliberate intimidation, following or stalking;
- f) Harassing photography or recording;
- g) Physical assault (including unwelcome touching or groping);
- h) Real or implied threat of physical harm; or

- i) Real or implied threat of personal, professional, or financial damage or harm.
- 2. AAOS Employees.** AAOS Employees who are subjected to unacceptable behavior should report it immediately to their supervisor (or another person in their direct line of reporting) and Human Resources. AAOS will address any unacceptable behavior by AAOS Employees in accordance with its Employment Policies.
- 3. Attendees.** AAOS reserves the right to take any action it deems appropriate against an Attendee who engages in unacceptable behavior.
- a) When AAOS receives a complaint of unacceptable behavior by an Attendee, the matter will be reviewed in a timely manner, taking into consideration the relevant facts and circumstances. The complainant and any parties involved may be asked to provide written statements.
 - b) Any Attendee found to have engaged in unacceptable behavior may be removed from the meeting or event (without refund) and/or excluded from future meetings.
 - c) Any AAOS member behaving in an unacceptable manner may be subject to additional consequences, including but not limited to suspension or expulsion from AAOS membership.