

## Potential questions and answers related to the All In Match policy for Endocrinology

### Is the NRMP All In Policy required for Fellowship Matches?

The Association of Program Directors in Endocrinology, Diabetes, and Metabolism (APDEM) is the sponsor for the National Residency Matching Program's (NRMP) Specialties Matching Service (SMS) for adult endocrinology. Sponsors of SMS Matches may voluntarily implement an All In Policy and, in doing so, require all participating programs to attempt to fill all positions in the Match. Sponsors of SMS Matches are not required to implement the All In Policy.

### Why did APDEM voluntarily implement an All In policy?

As of the year 2014, APDEM leadership had observed a growing interest from various interest groups—including resident candidates for subspecialty fellowships—for medical subspecialties to adopt “All In” policies. In early 2015, APDEM administered surveys to both endocrine fellowship program directors and endocrine fellows: 71% of program director respondents and 78% of fellow respondents indicated a preference for an All In Match policy. These results prompted APDEM leadership to explore the potential advantages and disadvantages of an All In Match policy in more detail. This exploration process spanned approximately two years and involved careful deliberations by APDEM Council and an All In Match Working Group, two program director/fellow surveys, frequent communication with APDEM members, and open comment periods regarding proposed policy options.

In late 2016, APDEM Council unanimously voted to *endorse* transition to an All In Match policy. Council members believe that, compared to available alternatives, an All In Match policy would (a) maximize applicant autonomy by maximizing each applicant's ability to evaluate programs without undue pressure; (b) maximize the overall success of the Match (with more applicants achieving better Match outcomes vis-à-vis their individual preferences); (c) best safeguard the integrity of the overall system of endocrinology fellowship position allocation; (d) maximize procedural fairness among Programs competing for a common pool of applicants; and (e) minimize the risk that APDEM would breach its annual contract with NRMP.

According to NRMP policy, APDEM Council (i.e., the governing body of APDEM) had full authority to move endocrine into an All In NRMP Match. However, given that Council believed that legitimate arguments could be made for and against an All In Match policy for endocrinology, APDEM Council decided to base its decision on a formal survey of all program directors (both APDEM members and non-members). APDEM Council prespecified that it would implement an All In Match policy with the NRMP if both (a) at least 75% of program directors participated in the survey and registered a formal preference (All In vs. status quo), and (b) at least two-thirds of program directors preferred an All In Match policy to the status quo. This survey was administered to all program directors from April to June 2017. The survey response rate was 92.2%, and 80.0% of respondents indicated a preference for the All In policy. Accordingly, APDEM Council unanimously resolved to adopt an All In Match policy to begin in the 2018 recruitment season. On March 1, 2018, APDEM and NRMP executed a formal All In Match agreement.

### What is the All In Policy?

There are two different—but related and overlapping—All In policies in play at the same time: APDEM's All In policy and the NRMP's All In Policy.

According to APDEM's All In Match policy, all programs are required to register and attempt to fill all positions in the NRMP Match (unless an exception is granted [see below]).

According to the NRMP's All In Policy: (1) any program registering for the Match must attempt to fill all positions through the Match; (2) programs planning to participate in the Match cannot offer positions outside the Match prior to program director registration and program activation; and (3) once a position has been offered outside the Match, the program no longer is eligible to enroll in the Match unless the offered position falls into one of the exception categories for the Match. Failure of a program to abide by this agreement could lead to NRMP sanctions. (Note that exceptions to the All In Policy may be granted.)

In a sense, one could consider NRMP's All In Policy to be "All In or All Out." The All In Policy does not require programs to include all positions for which they are accredited or approved: only the positions that will be filled for a specific appointment year must be offered in the Match. You can learn more about the NRMP's All In Policy at <http://www.nrmp.org/all-in-policy/>.

Importantly, APDEM's All In Match policy is consistent with but slightly different from the NRMP's All In Policy (i.e., the NRMP's "All In or All Out" policy). In particular, APDEM's All In Match policy is that all programs are required to register and attempt to fill all positions in the NRMP Match (unless an exception is granted). Accordingly, while 100% non-Match participation would *not* a violation of the NRMP's All In Policy, it *would* be a violation of APDEM's All In Match policy.

### **How will adherence to the All In Policy be monitored?**

The NRMP will monitor program compliance with the All In Policy in collaboration with APDEM. APDEM is expected to provide the NRMP with information about the number of fellows in training on a program-specific basis. (Early each academic year beginning in summer 2019, an APDEM All In Match Oversight Task Force will obtain from all programs a self-report regarding the number of fellows beginning the training program that appointment year.) NRMP will then compare that information to the NRMP Match enrollment data.

The APDEM All In Match Oversight Task Force would subsequently confirm adherence by comparing the combined match quotas for the previous two matches with the number of ACGME-approved positions that are filled in the current academic year (publicly-available via the ACGME's Accreditation Data System). For example, if a program had an NRMP quota of 2 in Fall 2018 and an NRMP quota of 3 in Fall 2019, the Program is expected to have no more than 5 filled ACGME positions for the 2020-2021 academic year (unless a Match exception had been granted).

Whenever a possible All In Policy violation is identified, the NRMP and/or the APDEM All In Match Oversight Task Force (as appropriate) would engage the Program in an adjudication process.

### **Under the All In Policy, what are the consequences for confirmed non-adherence?**

Programs that violate the NRMP's All In Policy will be investigated in accordance with the NRMP Violations Policy (<http://www.nrmp.org/wp-content/uploads/2018/06/2019-Violations-Policy.pdf>).

The following considerations, which are described on the NRMP website (<http://www.nrmp.org/all-in-policy/fellowship-matches/#>), are important to understand:

1. The NRMP does NOT require participation of all programs, even those in specialties that voluntarily implement the All In Policy.

2. NRMP monitors compliance with the All In Policy only for programs participating in the Fellowship Match.
3. The NRMP does NOT impose restrictions for non-Match participation and, when applicable, will levy only the sanctions outlined in Section 7.0 of the SMS Match Participation Agreement.

Although the NRMP would not investigate or sanction individual programs that do not use the NRMP Match at all (i.e., programs with 100% non-Match participation), this would still represent a breach of APDEM's All In Match policy, which requires all programs to register and attempt to fill all positions in the NRMP Match (unless an exception is granted). Failure to adhere to APDEM's All In Match policy (including 100% non-Match participation) will lead to revocation of Electronic Residency Application Service (ERAS) access for the two subsequent recruitment cycles (i.e., for two years after confirmation of policy non-adherence).

To reiterate: a program may choose 100% non-Match participation, and in doing so would not violate NRMP policy. However, 100% non-Match participation would violate APDEM's policy and would lead to revocation of ERAS access for two recruitment cycles.

Uninterrupted ERAS access represents an important incentive to adhere to APDEM's All In Match policy. But if a program were to decide that the negatives associated with All In Match participation outweigh the benefits of ERAS access, that program could choose 100% non-Match participation.

### **What is the role of a Memorandum of Understanding under APDEM's All In Match policy?**

Under APDEM's All In Match policy, all endocrinology training programs (both APDEM members and APDEM non-members) will be asked each year to sign a Memorandum of Understanding (MOU) regarding APDEM's All In Match policy. The deadline for MOU submission will be mid-May each year.

The sole purpose of the MOU is to establish and document that each Program understands APDEM's All In Match Policy in addition to consequences for failure to adhere to the policy. The MOU does not represent an agreement to adhere to the All In Match Policy, and it does not represent an agreement to execute and abide with the NRMP Match Participation Agreement.

Given the importance of the MOU, a given year's ERAS applications will only be made available to programs that sign that year's MOU regarding APDEM's All In Match policy. Programs executing an MOU after the mid-May deadline may be listed in ERAS, but ERAS would not inform candidates of late additions. The specific timeline for 2019 is as follows:

- Programs that sign and deliver the MOU to APDEM by Monday, May 10, 2019, at 5:00 p.m. EDT: a) will be listed in ERAS as a participating program in early June 2019; and b) will be able to receive candidates' ERAS applications using the ERAS Program Director Work Station beginning on July 15, 2019.
- Programs that sign and deliver this MOU to APDEM after Monday, May 10, 2019, will have access to candidates' applications, and they will be listed in ERAS as a participating program, but they may not initially be visible to candidates (as a participating program) in early June. ERAS will NOT inform candidates of the late addition of participating programs.
- Programs that do not sign and deliver this MOU to APDEM will not be listed in, nor have access to, ERAS for the 2019 recruitment season.

### **What justifies tethering ERAS access to MOU execution and policy adherence?**

APDEM Council considered this issue very carefully: Council concluded that, as sponsor for endocrine's NRMP SMS Match, APDEM may implement match-related policies and incentives that (a) help ensure APDEM adherence to its annual contract with the NRMP, (b) serve the best interests of fellowship candidates as a group, and (c) materially enhance procedural fairness among endocrine programs. The tethering of ERAS access to MOU execution and APDEM's All In Match policy adherence is also in keeping with the agreements between ERAS and the American Society of Nephrology and Infectious Diseases Society of America (sponsors of nephrology and ID matches, respectively).

### Can I apply for an exception to the All In Policy?

Exceptions to the All In Policy may be granted by APDEM and NRMP.

In early 2018, APDEM formally notified the NRMP that it intends to grant several exceptions to its All In Match Policy, and the NRMP formally acknowledged this intent.

When formally requested by a program, APDEM plans to grant the following exceptions to its All In Match Policy:

1. **U.S. military appointees to civilian programs:** The U.S. military has its own GME system with its own selection procedures. Placement decisions for all military GME training positions occur in November with results being released in mid-December. While most military personnel receiving endocrinology training do so within the military system, military personnel not securing a military-based position may be allowed to receive endocrinology training in the civilian sector. In this situation, the candidate must secure a suitable position her-/himself (i.e., the military does not pre-arrange contingency positions in the civilian sector). Given the timing of the NRMP Match vis-à-vis military placement decisions, military personnel not securing a military-based position could not begin civilian training the following July unless out-of-Match positions were allowed. Thus, APDEM plans grant exceptions for military personnel who applied for but did not secure a military-based position for the following academic year.
2. **Demonstrable candidate participation in the ABIM Research Pathway, when entry into the main residency match included a priori plans to pursue endocrinology fellowship at the same institution upon completion of 2 years of clinical training in the Internal Medicine residency program:** Sometimes called "short track," this is a well-defined pathway for residency candidates that, for Medicine-Endocrinology, involves (in sequence) 2 years of clinical Internal Medicine training (residency), one year of concentrated clinical endocrinology training, and 3 years committed to research training. In some cases, entry into a Medicine Residency via the ABIM Research Pathway strongly implies an early commitment on the part of the endocrinology fellowship program, even though the candidate initially matches via the Main Residency Match only. For this reason, APDEM will grant an exception in situations where entry into the Main Residency Match under the ABIM Research Pathway included demonstrably-*a priori* plans to pursue endocrinology fellowship at the same institution. Such exception requests must include the Program Director's confirmation that the candidate's entry into the Internal Medicine (IM) residency program included a priori plans to pursue fellowship at the same institution upon completion of 2 years of IM training.
3. **Candidates for established combined training programs designed to provide board eligibility for two different specialties with different NRMP codes:** An example of such a

combined training program is combined adult-pediatric endocrinology training program. There is currently no NRMP/SMS Match for combined adult-pediatric endocrinology, and there is currently no NRMP/SMS mechanism by which a fellow may be matched simultaneously to an adult endocrinology program and a pediatric endocrinology program. Therefore, entry into such programs necessarily involves placement outside of the match, at least on the part of one program. In such cases, the exception request must: a) be submitted by all program directors overseeing the combined training program; b) include evidence that the combined program is a formal and established one (e.g., a website link); and c) confirm that the fellow will be dually board-eligible upon successful graduation from the combined program.

- 4. Replacement of a fellow that resigns or is dismissed or replacement of a matched fellow that does not start training:** APDEM recognizes that such situations can represent an undue hardship on programs and the program's fellows. Accordingly, APDEM plans to allow rapid replacement of previously-occupied positions that were vacated and also for previously-matched candidates that do not begin the program. However, APDEM would impose certain restrictions, including the following: a program could replace a lost position out-of-Match only if the departing fellow resigns before achieving 75% of her/his required clinical training (e.g., this would not apply to a fellow in a 3-year clinical/research program who switches to [and completes] a 2-year clinical program); and such exception requests would need to be co-submitted by the program and the program's Designated Institutional Official.

Although APDEM intends to grant the aforementioned exceptions, all Match exceptions (including the foregoing) must be formally requested by the program and specifically granted by APDEM. Exception request letters should include details about the position to be offered, the applicant to whom the position will be offered, and any additional circumstances relevant to the request. The letter must be signed and submitted by the Program Director.

APDEM also recognizes that we may not have identified all situations in which a program might legitimately require an exception to the All In Match policy. Accordingly, APDEM intends to permit programs to request exceptions for situations not listed above. Such exception requests would need to be co-submitted by the program and the program's DIO. These requests will be considered by the All In Match Oversight Task Force on a case-by-case basis, and a final decision would be rendered by APDEM Council: such exceptions would be granted only if at least two-thirds of voting Council members vote to grant the exception. Only *exceedingly compelling* requests will be eligible for approval through this mechanism; and APDEM does not intend to grant exceptions that can be reasonably addressed via the NRMP Match (or by other means).

In accordance with the NRMP (<http://www.nrmp.org/all-in-policy/fellowship-matches/#>), exceptions will not be granted for international medical graduates needing visas or for programs in rural or medically underserved areas; international medical graduates with funding from their home countries; or combined clinical-research programs where the first year is not clinical training.

Note that requests for exceptions must be submitted annually in writing to APDEM (apdem@endocrine.org) with NRMP carbon copied (policy@nrmp.org) at least 3 weeks before a decision is required.

**If a program does not fill all desired positions in the Match (i.e., does not meet quota), can that program implement out-of-Match agreements to fill the unfilled positions for that cycle?**

This All In Match policy does *not* prohibit out-of-Match arrangements when a program fails to match to its full NRMP quota (i.e., “does not fill”), as long as candidates are available to begin training in July 2020, and as long as the arrangement is made between Match Day and June 30, 2020 (i.e., before the next recruitment season begins). For example, if a program establishes an NRMP quota of two, but only matches one fellow via the NRMP Match, the program can fill the one unmatched position in a post-Match “scramble.” As long as candidates are available to begin training in July 2020, and as long as the arrangement is made between Match Day and June 30, 2020 (i.e., before the next recruitment season begins), neither NRMP nor APDEM will penalize such out-of-Match scrambles, and programs do not need to obtain APDEM’s or NRMP’s approval. However, if such arrangements are made on or after July 1, 2020, a formal exception request must be submitted to APDEM. Note that unfilled positions from the December 2019 Match should not be offered to a candidate who is unavailable to begin training until July 2021.

**Will exceptions to the All In Match policy be granted for candidates with planned start dates other than July 1?**

No. APDEM Council believes that such situations can be satisfactorily addressed using the NRMP Match process. It may be a common misconception that NRMP mandates a July 1 start date, and that candidates who are unable to start July 1 must either (a) wait for the following year’s match or (b) take a position outside the Match. Although the widely-accepted fellowship start date is July 1, we have confirmed with the NRMP that they do not specify/mandate a fellowship start date of July 1 for fellows in the Match. (Also note that a July start date is not stated explicitly in the SMS Match Participation Agreement.) If during the recruitment process the program and candidate reach an agreement—and both clearly understand—that the start date is later than July 1, there would be no breach of NRMP or APDEM policy. (In this case, it seems advisable to obtain written confirmation from applicants that a delayed start date would be employed if the candidate were to match with the program.)

**Will exceptions to the All In Match policy be granted for new-but-not-previously-filled fellowship positions that open up before additional fellows can be brought in via the Match?**

Most on APDEM Council believe that, in these situations, adequate planning should prevent undue hardship to programs (e.g., programs seeking to create new positions can coordinate the availability of new positions with the match cycle). Although a program may be able to request an exception in such cases, such requests may not be granted.

**Will exceptions to the All In Match policy be granted solely on the basis that a candidate is an internal candidate (i.e., at the same institution)?**

No. APDEM Council believes that such situations can be satisfactorily addressed using the NRMP Match process. Programs that wish to retain specific internal candidates should place such candidates at the top of their rank order lists.

**Will exceptions to the All In Match policy be granted for international medical graduates needing visas, for international medical graduates with funding from their home countries, for programs in rural and medically underserved areas, or for combined clinical-research programs where the first year is not clinical training?**

No. The NRMP has already judged that such exceptions are unacceptable and/or unnecessary (<http://www.nrmp.org/all-in-policy/fellowship-matches/#>).

**Will exceptions to the All In Match policy be granted for candidates in unique tracks such as a 3-year combined clinical/research fellowship position?**

No. APDEM Council believes that such positions can be satisfactorily allocated through the NRMP Match process. To permit matching into specialized or non-traditional tracks, programs may establish a separate match for the unique tracks—which would have a unique NRMP code—in addition to the traditional 2-year track. If the unique track does not fill, the NRMP has a process (“reversion”) by which the position can be automatically donated to a traditional track. Any such reversion contingency plan must be established in the NRMP’s Registration, Ranking, and Results (R3) system by the quota deadline.

**Will exceptions to the All In Match policy be granted for fellows currently enrolled in an institution’s non-Match research fellowship?**

No. APDEM Council believes that such situations can be satisfactorily addressed using the NRMP Match process. Programs that wish to retain fellows currently in a non-Match research fellowship should place such candidates at the top of their rank order lists.

**Will exceptions to the All In Match policy be granted for candidates with limited or no availability during normal recruitment months?**

In general, no. APDEM Council believes that, in most cases, such situations can be satisfactorily addressed using the NRMP Match process. In many such cases, recruitment and interviews could be performed before normal recruitment months. Although a program may be able to request an exception in such cases (through a potential petition process mentioned above), such requests may not be granted.

**Can I consider my program’s applicant pool before deciding whether to participate in the endocrinology Match?**

Program directors can register for a Fellowship Match until the Rank Order List Certification Deadline, but the program must be activated for Match participation no later than the Quota Change Deadline. Under the NRMP’s All In Policy, programs planning to participate in the Match cannot offer positions outside the Match prior to program director registration and program activation. Once a position has been offered outside the Match for that appointment year, the program no longer is eligible to enroll in the Match unless the position offered is one that qualifies for an exception under the All In Policy.

As described above, 100% non-Match participation would not be a violation of NRMP’s All In Match policy, but it would be a violation of APDEM’s All In Match policy.

**What if our program has ACGME-approved positions, but we do not plan to fill any positions this year?**

In this specific circumstance, 100% non-Match participation would not be a breach of APDEM’s All In Match policy. If your program is not planning on filling any ACGME-approved positions, please inform APDEM at [apdem@endocrine.org](mailto:apdem@endocrine.org).

**What is NRMP’s current policy regarding communication with candidates?**

The Match Participation Agreement (MPA) involves certain Restrictions on Persuasion (section 6.2; <http://www.nrmp.org/wp-content/uploads/2018/06/2019-MPA-Specialties-Matching-Service.pdf>).

According to the MPA:

One of the purposes of the **Specialties Matching Service** is to allow both applicants and programs to make selection decisions on a uniform schedule and without coercion or undue or unwarranted pressure. All participants in the Match shall respect the right of applicants to freely investigate program options prior to submission of a final rank order list. Both applicants and programs may express their interest in each other; however, they shall not solicit verbal or written statements implying a commitment. Applicants shall at all times be free to keep confidential the names or identities of programs to which they have or may apply. The NRMP recommends that each program director and applicant read carefully the Match Communication Code of Conduct for information on acceptable methods of interaction during the interview and matching processes.

In addition, during the interview and matching processes, it is a breach of this Agreement for:

- (a) a program to request applicants to reveal the names, specialties, geographic locations, or other identifying information about programs to which they have or may apply; or
- (b) a program to request applicants to reveal ranking preferences; or
- (c) an applicant to suggest or inform a program that placement on a rank order list is contingent upon submission of a verbal or written statement indicating the program's preference; or
- (d) a program to suggest or inform an applicant that placement on a rank order list is contingent upon submission of a verbal or written statement indicating the applicant's preference; or
- (e) a program and an applicant in the **SMS** to make any verbal or written contract for appointment to a concurrent year residency or fellowship position prior to the release of the List of Unfilled Programs.

**Only the final preferences of programs and applicants, as expressed on their final certified rank order lists, will determine the offering of positions and the placement of applicants through the SMS.**