

Preparing for Transition to a Fellowship Checklist

Moving to a New Location

- Find new apartment/house and sign lease
- Select moving date
- Set-up movers for current location
- Set-up movers for new location
- Set-up moving truck or moving company (if using national moving company, consider container shipment vs. traditional van line shipment by weight)
- Get moving supplies (boxes, tape, wrap, moving blankets, dolly, if moving services are not hired for these tasks)
- Pack
- Call internet/cable provider to terminate services on move-out date
- Call utility companies (gas, electric, water) to terminate services on move-out date
- Call gym to terminate services on move-out date
- Set-up internet/cable at new place
- Set-up utilities (gas, electric, water) account at new place
- Get a new gym membership
- Change car insurance company, if needed
- Change rental or home owner's insurance company, if needed
- Update driver's license
- Update car registration
- Find new primary care physician and any other physician specialists you need

Fellowship Program-Specific Tasks

- Set-up occupational health screening appointment, if needed
- On-boarding tasks required by hospital
- New physician license, if moving states
- Mark calendar with orientation dates
- Make sure your new program knows when you're taking Boards and make sure you're not scheduled for any conflicts then (e.g., call, game coverage)
- Request vacation dates
- Request conference dates
- Make sure to allocate/save days for job interviews
- Discuss expectations from fellowship director and other attendings

Update Moving Address

- Family/friends
- Banks/financial accounts/credit cards (don't forget your Apple Pay or other pay methods you use for apps or other automatic transactions)
- Insurance providers (car insurance, etc.)
- National organizations (AAPM&R, etc.)
- Accounts that you use for purchases (Amazon, etc.)
- Alumni universities/institutions
- Set-up USPS mail forwarding
- Provide your current program with updated contact information/address

Other Tasks Related to Starting Fellowship

- Update LinkedIn, Doximity or social media platforms with new position, if applicable
- Renew memberships with national organizations (may need to let some of them know you are in fellowship so that you can get the rate for in-training fellows)
- Look into/obtain disability insurance (most economical as a resident/fellow and AAPM&R has a recommended provider with Treloar and Heisel)
- Transfer or roll over 401k or retirement plan from old institution, if needed
- Open or contribute to Roth IRA, if possible (or at least look into it)
- Update resume with mailing address, new position, etc.



Preparing for Transition to a Fellowship Checklist (continued)

Discussions with New Job

Negotiation Considerations

- Start date (if you have the means, take time off prior to starting work as it may be the last time you have an extended break until you retire!)
- Relocation assistance and/or starting bonus—consider asking for lump sum that you can allocate as needed
- Reimbursement for Medical license, Board exams, professional organization dues
- Vacation time, and CME time and allowance
- Call schedule
- Bonus structure
- Restrictive covenant (non-compete clause)
- Partnership track, if applicable
- Hospital credentialing paperwork
- Equipment availability (type of ultrasound, EMG machine, etc.)

Additional Tasks to Consider for Fellowships Outside of PM&R Checklist

- Make sure your program is aware of your Board exam schedule and how PM&R Boards work (written boards + oral boards); make sure you're not scheduled for any conflicts then (e.g., call, game coverage)
- Figure out which conferences your program wants you to attend and if they're okay if you attend any particular PM&R-related conferences you may want to attend
- See if you can find PM&R faculty mentors either in the hospital system or in the area that you can stay connected with
- If there is a PM&R program in your city, find out if you can participate in mock oral boards, practice tests, etc.

Starting in Practice Checklist

- Check the "Moving to a New Location" Checklist
- Obtain or look into disability insurance (most economical as resident/fellow prior to graduation)
- Select your professional references you will use for credentialing (ask them for permission and consider giving them a small present for their time/work)
- Update LinkedIn, Doximity, or social media platforms
- Save any templates or documents from residency/fellowship that you may use
- Update resume
- Consider creating LLC or Corporation (depending on state), if going to do locums
- Consider obtaining malpractice insurance, if needed
- Open or contribute to IRA if possible (or at least look into it)
- Transfer or roll over 401k or retirement plan from old institution, if needed

**For more information, contact
AAPM&R at (847) 737-6000.**

