Preventing 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.

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Prefering 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.)

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.

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.

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