

## Preparing and Submitting a Clinical Portfolio for Promotions Review

### University of Maryland School of Medicine 2020-21

#### The Clinical Portfolio as part of your packet

The Clinical Portfolio is part of your promotions packet at the University of Maryland School of Medicine (UMSOM). When preparing for promotion, we encourage all clinicians to document their clinical roles and to compile a portfolio of evidence of their impact or effectiveness in these roles.

Ideally, faculty should have existing Clinical Portfolios that have been reviewed annually with a mentor, Division Head, Department Chair, Center or Institute Director. Clinical roles of faculty vary significantly. It may be helpful to present a well-developed clinical role that has value to the individual and to the institution. Evidence of additional training to focus on a specialty interest or departmental/divisional support in developing a unique clinical role may be helpful. Evidence of the impact of your clinical role can support your candidacy for promotion, tenure, or both.

The roles of clinicians at the UMSOM are many and varied, as are the measures of impact and effectiveness. Data may include hours spent in direct patient care, numbers of patients seen, numbers of procedures performed, numbers of studies analyzed, or billing or RVU data. Data may be collected relative to a clinical focus, such as the implementation of new patient safety guidelines, patient outcomes of clinical care performed, or the impact that one's work may have on addressing a local, regional or national need for specialty care of any particular kind.

#### The Clinical Portfolio Documents Your Clinical Role(s) and Provides Measures of Clinical Activity and the Impact or Outcome(s) of Your Role(s)

We suggest that you begin by listing your major clinical responsibilities in the past 5 years. These may include direct patient care in a variety of settings. Time spent and work done on any inpatient service, providing ambulatory or outpatient care, working in the operating room, and home care may all be relevant to your clinical role. Indirect patient care responsibilities may include reviewing or interpreting the results of diagnostic or other clinical tests such as EEGs, stress tests, diagnostic imaging, or laboratory studies. Indirect clinical activities can occur individually or in group settings (committees). A superior clinical practice can be the focus of promotion for path 2.

You may have one or more leadership role(s) in your clinical setting. These may include developing and practicing in a new specialty clinic, serving as the lead clinician or director of a clinic or center, or being appointed a leader for quality assurance or patient safety performance improvement. You will want to document your role carefully, including the impact or outcome of your work in that role. Data may include numbers of patient visits or RVUs, patient satisfaction data, referral data, or improvements in a patient safety or quality of care measure as a result of your study and intervention. Proven clinical leadership in any of these areas can be a significant positive factor towards your promotion especially for path 2.

## Clinical Portfolio Format

There are a number of acceptable formats for presenting your clinical roles and impact data to the APT (Appointment, Promotions, and Tenure) Committee to evaluate your clinical work for promotion. We suggest starting with the following categories:

1. Direct Patient Care and Indirect Patient Care
2. Innovation and Leadership in the Clinical Setting
3. Performance Improvement in the Clinical Setting

Most faculty will have one or more clinical roles in one or more of the above settings. Rarely, candidates may have roles and impact data for all three settings. The APT Committee does not expect you to have data in all 3 categories but rather looks for evidence of achievement in your chosen work.

We strongly encourage all faculty to discuss options for presenting a clinical portfolio with established faculty in their own departments. These discussions and examples are invaluable and will be more useful as there will be greater similarities within departments than across the school. All departments have designated APT Partners, which can be found [here](#). APT Partners serve as a useful resource, as they can help you compile your promotion packets, and put you in contact with your Departmental APT Committee members, all of whom are experts at helping you strengthen your application. In addition, your [Department websites](#) should have a list of current Departmental APT Committee members. Faculty are encouraged to seek out advice and feedback to their promotion packets from some of their Departmental APT Committee members.

## Additional Advice for Promotion Preparation

### Letters

When faculty go up for promotion or tenure, their department will solicit letters of reference on their behalf from colleagues internal and external to the School of Medicine. It is your responsibility to compile a list of colleagues' names, addresses, and e-mail addresses across the nation who know you and can recommend you. These national faculty should be familiar with you, but not have worked closely with you. Now is a good time to begin thinking of this list. In many situations, they need to rank higher than your current rank.

In addition to these external and internal letters of recommendation, up to 3 letters of support may be included to strengthen your clinical portfolio as part of a promotion packet. You may invite letters from individuals who can comment on and verify the impact or outcome of your role(s), such as a referring physician or colleague in your field. These are not always needed if there is clear data in your teaching portfolio already.

### Resources

Faculty members are encouraged to speak with their mentors, department APT contacts, and their Department Chair as early as possible when beginning the promotion process. Additional advice and mentoring is available by contacting Dr. Silke V. Niederhaus ([sniederhaus@som.umaryland.edu](mailto:sniederhaus@som.umaryland.edu)) or Dr. Ada I. Offurum ([aibe@som.umaryland.edu](mailto:aibe@som.umaryland.edu)) in the Office of Faculty Affairs and Professional Development.