



Clinician Scholars Program Guidance Document

FY23 Cohort: September 1,
2022 – August 31, 2023

Table of Contents

Introduction.....	2
About the MATEC Clinician Scholars Program	2
Required Number of Scholars by LP	3
Funding Allocation.....	3
Who is eligible to apply for the MATEC Clinician Scholars Program?	4
Mandatory Criteria for Participation	4
Primary Eligibility	5
Secondary Eligibility	5
Who is NOT eligible to apply to the MATEC Clinician Scholars Program?.....	6
Who decides which applicants are accepted into the MATEC Clinician Scholars Program?	6
What is required to successfully complete the MATEC Clinician Scholars Program?.....	7
MATEC Clinician Scholars Program Roles and Responsibilities	8
MATEC Central Office.....	8
Regional MAI Coordinator.....	8
Local Partners (LPs):.....	9
MATEC Clinician Scholars Program Monitor.....	9
MATEC Clinician Scholars Program Mentor.....	10
Evaluation of the MATEC Clinician Scholars Program	10
Baseline Self-Assessment Survey	10
Midpoint Assessment Surveys.....	11
Endpoint Assessment Surveys.....	11
Transcript (Planning and/or Assessment Tool)	11
National Evaluation of MAI Programming (CORE)	12
Continuous Quality Improvement	12
Completion.....	13
Enrollment Protocol and Activity Timeline for Incoming (New) Scholars	13
Completion Protocol and Timeline for Outgoing (Graduating) Scholars.....	15
Accessing Program Documents.....	16
Appendix A: History of the MATEC Clinician Scholars Program.....	17



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Introduction

The Midwest AIDS Training + Education Center (MATEC) has a long history of providing educational opportunities to minority and predominantly minority-serving clinicians (defined as clinicians with a patient population that is greater than 50% racial/ethnic minority) who provide care to patients with HIV. MATEC serves as a “safety net” training program for these clinicians, just as the other components of the Ryan White HIV/AIDS Program serve as a safety net for people with HIV. In a continued effort to prioritize the needs of these clinicians, MATEC transformed our MATEC Clinician Scholars Program into our primary regional Minority AIDS Initiative (MAI) effort as part of the Midwest AETC project.

With a focus on minority and minority-serving clinicians, the goal of the MATEC Clinician Scholars Program is to strengthen the HIV workforce in the Midwestern United States via an intensive, year-long training program focused on HIV treatment, care, and prevention.

The history of program development is available in Appendix A.

About the MATEC Clinician Scholars Program

The MATEC Clinician Scholars Program is a 12-month training program specifically designed for minority or predominately minority-serving, frontline clinical care providers (physicians, physician assistants, nurse practitioners, advanced practice nurses, and pharmacists) who are interested in the diagnosis, treatment, medical management, and prevention of HIV. For the purposes of this program, minorities are described as individuals who identify their race as Black/African American, Alaska Native, American Indian, Asian American, Native Hawaiian, and/or Pacific Islander, and/or who identify their ethnicity as Hispanic/Latino.

The MATEC Clinician Scholars Program is a standardized, yet participant-centered program. The purpose of the program is to support participants to acquire or strengthen the following 11 core capabilities:

1. Utilize local, national, and international epidemiology data to identify emerging trends in the epidemic and potential impact on practice and HIV testing.
2. Utilize current Department of Health and Human Services treatment guidelines, including those related to special populations, to manage HIV infection.
3. Incorporate current standards of care, including those related to special populations, into management of HIV infection.
4. Use results of CD4, HIV viral load, and HIV resistance testing, in combination with antiretroviral medication history, to choose optimum treatment regimens.
5. Manage treatment failure.
6. Address factors that may inhibit a patient’s adherence to a prescribed treatment regimen.
7. Institute appropriate opportunistic infections prophylaxis and diagnose and manage or refer common opportunistic infections.
8. Diagnose and manage common clinical syndromes related to HIV disease. Manage common co-morbid conditions related and unrelated to HIV disease.
9. Recognize and manage common antiretroviral medication side effects and drug interactions with those medications.
10. Provide appropriate and professional screening and referral or risk/harm reduction counseling related to sexual behaviors, drug use, and mental health.
11. Provide care that incorporates patient’s race, ethnicity, gender, age, sexual orientation, and the myriad of psychosocial issues impacting patient’s lives.

Although it is not the purpose of the MATEC Clinician Scholars Program to develop clinicians as faculty, LPs are encouraged to look for participants who may have great potential as faculty and are interested in developing themselves as such. For those participants, additional training and technical assistance should be made available so they can review adult learning principles, develop teaching skills, develop effective presentations, and learn how to use distance learning technology.

Required Number of Scholars by LP

Each LP is required to recruit a minimum number of Scholars to participate in the MATEC Clinician Scholars Program. This number was determined, in part, on the prevalence of HIV among racial and ethnic minority persons within each state served by the LP, with a minimum of each LP having at least one Scholar. The minimum number of Scholars will be reviewed and updated at the next competitive grant cycle beginning July 2024. Below are the required minimum number of Scholars by LP:

- Illinois: 4
- Indiana: 2
- Kansas: 1
- Iowa: 1
- Michigan: 3
- Minnesota: 1
- Missouri: 2
- Nebraska: 1
- Ohio-Cincinnati: 1
- Ohio-Columbus: 1
- Wisconsin: 1

LPs may recruit and accept more Scholars than required so long as the LP has the resources to meet programmatic requirements and provide each Scholar with a comparable experience. LPs wishing to accept more than the minimum number of Scholars must inform the Regional MAI Coordinator prior to accepting additional Scholars. Regional Leadership can refuse additional Scholars for an LP based on available resources, past experiences with an LP accepting additional Scholars, or other concerns with the LP accepting additional Scholars.

Funding Allocation

When accepting Scholars using primary eligibility criteria, LPs must allocate at least \$15,000 for their first Scholar and \$10,000 for each subsequent Scholar in MAI funding to support program activities, including staff and faculty compensation and training experiences.

In situations where secondary eligibility criteria are used because an LP cannot recruit an applicant who meets primary eligibility criteria OR wishes to recruit a specific applicant who does not meet primary eligibility criteria to meet their minimum number of Scholars, an LP will be asked to use other funding lines, such as Core or HIV Practice Transformation funding, to support the Scholar's program year. An LP will need to allocate \$15,000 for the first Scholar and \$10,000 per subsequent Scholar. Using secondary eligibility criteria in this manner may result in reduced MAI funding for the LP, additional MAI programming being completed by the LP, or coordination of a regional MAI project by the LP in conjunction with the Regional MAI Coordinator.

In situations where secondary eligibility criteria are used because an LP wishes to accept more **Scholars than required**, an LP will be asked to use other funding lines, such as Core or HIV Practice Transformation funding, to support the Scholar(s) program year. An LP will need to allocate \$10,000 per subsequent Scholar.

Who is eligible to apply for the MATEC Clinician Scholars Program?

The information in this section outlines the eligibility criteria for the MATEC Clinician Scholars Program.

Mandatory Criteria for Participation

All applicants who wish to be considered for participation in the MATEC Clinician Scholars Program must meet the following criteria:

1. Clinicians who are actively licensed as physicians, physician assistants, nurse practitioners, advance practice nurses, or pharmacists, currently providing direct clinical care services, and anticipate continuing to do so within the Midwest region served by MATEC for at least one-year post-program: Illinois, Indiana, Iowa, Kansas, Michigan, Missouri, Minnesota, Nebraska, Ohio, and Wisconsin.
2. Have some baseline knowledge of the following areas (to be self-assessed by applicants):
 - a. Local HIV epidemiology, transmission modes, current testing methodologies, and current CDC testing recommendations to diagnose HIV infection
 - b. Natural history of HIV disease and milestones related to treatment and outcomes
 - c. HIV pathogenesis
 - d. Antiretroviral medications and how they relate to HIV viral life cycle
 - e. Interpretation of CD4 counts and HIV viral load results to identify an AIDS diagnosis, risk of opportunistic infection, and need to begin antiretroviral treatment
 - f. HIV resistance testing and concepts of interpretation
 - g. Common co-morbid conditions in HIV infection
 - h. HIV prevention
 - i. Local, regional, and national resources regarding standards of care and HIV treatment guidelines*
3. Attest to the following in their application:
 - a. Intent to continue working for their current employer for the duration of the program and procure a Statement of Workplace Endorsement from their employer.
 - b. Not participating in the program solely to provide HIV care outside the United States.
 - c. Ability to complete all program requirements.

**Applicants are responsible for providing a self-assessment of their baseline HIV knowledge. Applicants provide this assessment as part of their MATEC Clinician Scholars Program application. LP should work with applicants who self-identify as not having a working knowledge of concepts described above through traditional MATEC program offerings prior to the MATEC Clinician Scholars Program Immersion Institute. These activities may include self-study of the National HIV Curriculum, online training, webinars, local programming, and local clinical experiences offered by MATEC.*

Primary Eligibility

The LP should recruit applicants who meet the following primary eligibility criteria:

1. Clinicians who meet at least one of the following MAI eligibility criteria:
 - a. Self-identify on their Participant Information Form (PIF) as a racial or ethnic minority.
 - b. Self-identify on their Participant Information Form (PIF) as currently providing direct clinical care to a patient population of racial and/or ethnic minorities that is greater than or equal to 50% of their total patient population.
2. Clinicians are a novice HIV care provider (<5 years of experience in HIV care).
 - a. Exemptions may be given, at the discretion of the Regional Review Committee, to accept clinicians with more experience. The LP will need to submit, in writing, an explanation as to why the clinician should be accepted.

Secondary Eligibility

In situations where an LP has more applicants than resources, or when after an exhaustive search an LP cannot identify an applicant who meets primary eligibility, preference should be given to clinicians who:

- Currently provide direct clinical care in one of the following settings:
 - Clinics funded under the HRSA Ryan White HIV/AIDS Program
 - Correctional settings (County, State, or Federal)
 - Rural and Community Health Centers
 - Other federally supported health care facilities, such as Indian Health Service and Veterans Administration
 - Other medically underserved communities
- Currently prescribe antiretroviral medications under the AIDS Drug Assistance Program (ADAP)
- Currently provide clinical care in an area that has been impacted by a public health emergency related to the spread of hepatitis C and HIV infection

LPs in the position of not being able to recruit an applicant who meets primary eligibility should submit the following information to the Regional Review Committee in writing:

- Description of their efforts to recruit an applicant who meets primary eligibility
- A strong case for the proposed applicant who must meet at least one of the secondary criteria described above
- Which funding line will be used to support the applicant if the Regional Review Committee affirms that MAI funding cannot be used to support the applicant (additional information below under "Funding Allocation")

Inadequate communication about recruiting applicants utilizing secondary eligibility criteria with the Regional MAI Coordinator and Regional Review Committee may result in rejection of the applicant. LPs concerned about the eligibility of their applicant(s) should contact the Regional MAI Coordinator for assistance and guidance.

Who is NOT eligible to apply to the MATEC Clinician Scholars Program?

- Clinicians not actively licensed
- Clinicians not currently providing direct clinical care services (e.g., clinicians whose sole role is administrative)
- Clinicians who do not have a working knowledge of the basic HIV/AIDS concepts described above
- Doctoral, graduate, and undergraduate students who are not currently licensed, are not currently providing direct clinical care services, and/or are participating in an infectious diseases-focused program, including but not limited to residency
 - Exemptions may be given at the discretion of the Regional Review Committee; requests for an exemption should be submitted to the Regional MAI Coordinator, in writing, prior to the application deadline
- Clinicians currently in an Infectious Diseases Fellowship Program
 - Exemptions may be given at the discretion of the Regional Review Committee; requests for an exemption should be submitted to the Regional MAI Coordinator, in writing, prior to the application deadline
- Clinicians seeking training with the sole purpose of providing HIV care outside of the United States
- Other allied healthcare providers and paraprofessionals, including but not limited to nurses, oral health providers (dentist, hygienist, and dental assistants), medical case managers, social workers, mental health professionals, health educators, public health providers, dietitians, and substance use counselors.

Who decides which applicants are accepted into the MATEC Clinician Scholars Program?

The LP may preliminarily deny applicants. For applicants that the LP will deny at the application stage, the LP will inform the Regional MAI Coordinator, in writing, that they will not be approving the applicant and why. For applicants that the LP is willing to accept into the program, they will complete an LP Applicant Review Form on each applicant and submit the form(s) to the Regional MAI Coordinator. The Regional MAI Coordinator will compile the forms and applications and submit them to the Regional Review Committee.

The Regional Review Committee, comprised of the MATEC Regional Medical Director, Regional Project Director, Regional MAI Coordinator, and at least one representative from an LP, will have the authority to accept or reject applicants for the MATEC Clinician Scholars Program. Applicants may be preliminarily rejected from the program for the following reasons:

- Applicant does not meet primary or secondary eligibility criteria (outlined above)
- LP recruited all current applicants from the same location (if multiple applicants) or has repeatedly recruited from the same location year after year

- Concerns about applicant ability to complete program requirements based on information provided in the application materials
- Concerns related to disciplinary action against an applicant's licensure

If the Regional Review Committee has concerns about an applicant that may lead to rejecting their application, they will inform the LP in writing of their concerns. The LP will have seven days to provide additional information and/or justification for the acceptance of the applicant. The Regional Review Committee will make a final decision to accept or reject the applicant after receiving the additional information/justification.

If the Regional Review Committee rejects the applicant, and the LP will not be able to meet their minimum requirement of program participants without that applicant, the LP will be allotted until two weeks prior to the Immersion Institute to recruit a new applicant. That applicant must be reviewed by the Regional Review Committee.

The LP may choose to accept or reject applicants approved by the Regional Review Committee if the LP recruits more applicants than available participant slots but cannot accept an applicant that has been rejected by the Regional Review Committee.

What is required to successfully complete the MATEC Clinician Scholars Program?

To successfully complete the MATEC Clinician Scholars Program, participants must:

- Prior to the MATEC Clinician Scholars Program Immersion Institute sign up for and present a case during the MATEC Clinician Scholars Program Immersion Institute or Collaborative Learning Series
- Participate in all regional MATEC Clinician Scholars Program Immersion Institute activities
- Complete at least 12 hours of clinical preceptorship in HIV care during which participants will learn from a variety of cases to be consistent with learning capabilities. To support learning and relationship building, it is highly recommended that at least half of these clinical preceptorship hours be completed within the first six months of the program.
- Complete at least 40 hours of training, including but not limited to: workshops; online training and webinars; face-to-face Mentor meetings; in-person training; self-study; clinical preceptorship; and/or clinical consultation. At least half of these training hours should be completed within the first six months of the program.
 - **NOTE:** If a Scholar is practicing within an HIV Practice Transformation Program (HPTP) clinic, monthly coaching hours do not count toward the 40 hours of training. HPTP coaching hours are cumulative of all coaching conducted during that month, not just coaching with that specific Scholar.
- Attend and participate in at least five sessions of the MATEC Clinician Scholars Program Collaborative Learning Series
- Participate in all evaluation activities, including the baseline, midpoint, and endpoint self-assessments administered by the Regional MAI Coordinator or regional evaluation team.

MATEC Clinician Scholars Program Roles and Responsibilities

MATEC Central Office

The MATEC Central Office is responsible for:

- Selecting and supporting a Regional MAI Coordinator for the region
- Reviewing regional program curricula
- Serving as faculty for regional programs, when applicable
- Participating in the Regional Review Committee
- Owning facility coordination for the in-person Immersion Institute
- Conducting baseline, midpoint, and endpoint assessment surveys as part of the evaluation plan
- Analyzing data from evaluation and assessment tools
- Providing timely feedback to LPs

Regional MAI Coordinator

The Regional MAI Coordinator will work closely with the Project Director, the Regional Assistant Director, the Evaluation Team, and all the LPs in the region to ensure that the MATEC Clinician Scholars Program gets the attention it deserves. This position will dedicate at least one-quarter of their time to the MATEC Clinician Scholars Program.

The roles and responsibilities of the Regional MAI Coordinator include but are not limited to the following:

- Coordinating the enrollment, assessment, and graduation processes
- Updating moXmi reporting to include currently enrolled Scholars
- Maintaining program documents, including but not limited to this guidance document, application forms, case forms, and Collaborative Learning Series and case tracking form
- Managing regional programming in moXmi
- Coordinating, in conjunction with the Indiana LP, the Immersion Institute and Collaborative Learning Series
- Obtaining continuing education credit for the Immersion Institute and Collaborative Learning Series
- Monitoring transcripts monthly
- Updating and sending baseline, midpoint, and endpoint assessments to Scholars and LPs
- Reviewing transcripts at 6-months and year-end
- Reviewing and submitting assessment results to Monitors at baseline, mid-year, and year-end
- Coordinating monthly updates during the MATEC Regional Project Meeting
- Communicating regularly with Monitors and Mentors, as appropriate
- Assisting LPs and Scholars with program questions and concerns, as appropriate
- Providing training to LPs on their programmatic responsibilities
- Submitting monthly, semi-annual, and annual reports to HRSA, or more frequently as requested
- Attending and preparing for COMET quarterly, the Regional Coordinator Meeting monthly, and Regional MAI Check-In meetings as scheduled
- Drafting the MATEC Clinician Scholars Program narrative and work plan for the competitive grant application
- Conducting quality improvement activities for the program, as appropriate

Local Partners (LPs):

MATEC LPs are responsible for:

- Designating an LP staff person(s) to act as Monitor(s) for the MATEC Clinician Scholars Program
- Identifying a member of LP Clinical Leadership or faculty to act as a Mentor for the Scholar(s)
- Facilitating the onboarding of new staff and faculty to the MATEC Clinician Scholars Program
- Promoting and recruiting for the MATEC Clinician Scholars Program
- Providing the link to the application package to eligible candidates
- Screening candidates to ensure that they come to the MATEC Clinician Scholars Program with a baseline understanding of HIV/AIDS
- Supporting candidates not accepted by engaging them in MAI Training Series (MTS) and/or offering MATEC programming at local or regional level
- Completing the LP Applicant Review Form and submitting it to the Regional Review Committee
- Notifying applicants of whether they have been accepted into the MATEC Clinician Scholars Program after they receive notice of acceptance from the Regional Review Committee
- Assisting Scholars and Mentors to develop a plan of study and timeline for completion
- Monitoring the Clinician Scholar throughout their 12-month course of study and reporting training and preceptorship hours into moXmi
- Notifying the Regional MAI Coordinator when challenges arise that could result in a Clinician Scholar not completing the program as planned
- Mentoring Clinician Scholar(s) throughout their 12-month course of study
- Encouraging Scholar participation in the National HIV Curriculum and in the annual American Conference for the Treatment of HIV, also known as the ACTHIV Conference, or an equivalent conference to develop expertise around the 11 core capabilities
- Supporting Central Office in arranging travel that will allow for Scholars to participate in all regional MATEC Clinician Scholar Program programming and associated evaluation activities, as needed
- Continuing to aid the Graduated Scholar(s) to improve across any capabilities that the Scholar(s) is still developing capability or is minimally capable, as appropriate

MATEC Clinician Scholars Program Monitor

The MATEC Clinician Scholars Program Monitor is an LP staff person who recruits, supports, and monitors the Clinician Scholar throughout their 12-month course of study. The roles and responsibilities of the Monitor include but are not limited to the following:

- Recruiting clinicians who are eligible for the MATEC Clinician Scholars Program
- Providing the link to application materials to interested clinicians
- Screening all applicants via a brief meeting (in person or over the phone). The screening process includes providing an overview of the MATEC Clinician Scholars Program and eligibility for the program.
- Encouraging participation in all evaluation activities, and assisting with distribution and collection of evaluation activities when requested
- Matching participant with MATEC Clinician Scholars Program Clinical Mentor in collaboration with local clinical leadership
- Supporting Scholar(s) and Mentor(s) in developing training plans and selecting training opportunities appropriate to program objectives and Scholar goals
- Maintaining records in moXmi to document the Scholar's participation in the program for MATEC and related non-MATEC activities.

- Assessing the engagement of Scholars throughout their course of study
- Maintaining monthly contact with Scholars
- Ensuring that the Mentor has interacted with the Scholar at least once per month
- Arranging Clinical Preceptorship opportunities in accordance with program requirements
- Facilitating submission of a Scholar case during the MATEC Clinician Scholars Program Immersion Institute or Collaborative Learning Series

MATEC Clinician Scholars Program Mentor

The MATEC Clinician Scholars Program Mentor, an expert in HIV care, is responsible for developing a relationship with the Scholar. Scholars will be matched with a member of the LP Clinical Leadership and/or other expert faculty as a primary component of their learning experience. Mentors provide opportunities for Scholars to observe, apply, and improve the clinical skills they will need as they enter the arena of HIV/AIDS care.

Working closely with the MATEC Clinician Scholars Program Monitor, the roles and responsibilities of the Mentor include but are not limited to the following:

- Interacting with Scholars, at minimum, every month during their 12-month course of study to discuss progress towards goals, provide feedback on their progress and development, and/or establish new goals that will increase clinical competency
- Documenting progress and attainment of capabilities on the midpoint and endpoint assessments
- Providing the setting and opportunity for Scholars to observe patient care, simulated patient situations, and/or respond to case scenarios
- Reinforcing the connection between ongoing education and HIV care
- Facilitating the acquisition of clinical skills and the understanding of patient-centered care needed to provide quality HIV care
- Developing learning goals that are clearly aligned with the activities and capabilities described in the MATEC Clinician Scholars Program
- Reviewing the National HIV Curriculum, identifying modules that should be included into the Scholar's plan of study, and encouraging Scholars to participate in those modules
- Participating in evaluation activities designed to assess and evaluate whether established capabilities have been met
- Responding to questions from the Scholar(s) aimed at improving clinical problem solving, changing the behavior of the provider for them to make better or more appropriate clinical care decisions, and imparting the most up-to-date knowledge regarding specific HIV patient care. These interactions should be reported as Clinical Consultations.

Evaluation of the MATEC Clinician Scholars Program

Program evaluation is an important component of the MATEC Clinician Scholars Program. The evaluation plan is comprehensive and requires input from the Scholar, the Mentor, the Monitor, the Regional MAI Coordinator, and the Regional Evaluation Team.

The primary sources of data for evaluation purposes are assessment surveys and transcripts. All the components of the evaluation plan are described in detail below.

Baseline Self-Assessment Survey

The Baseline Self-Assessment Survey is a tool that offers Scholars an opportunity to provide a self-assessment of their knowledge, skills, and abilities related to HIV/AIDS care prior to the start of their MATEC Clinician Scholars Program cohort year.

This tool is designed to be administered prior to the Scholar's participation in the Immersion Institute. LPs will be asked to ensure that their Scholars understand the importance of this evaluation tool and complete it as requested. Results will be compiled and shared with LPs, who will be asked to develop plans of study aimed at addressing areas of weakness identified by Scholars at the beginning of the program. The plan of study may include, but is not limited to, an outline of topics the Scholar will be learning about, a list of programs they will or can participate in, and/or a schedule of when they will be participating in their clinical preceptorships. This may be a formal document or part of a conversation amongst the Scholar, Monitor, and/or Mentor.

Midpoint Assessment Surveys

There are two midpoint assessment surveys: the Scholar Midpoint Assessment Survey and the Mentor Midpoint Assessment Survey.

The Scholar Midpoint Assessment Survey is a tool that offers Scholars an opportunity to provide MATEC with feedback on their learning and experiences at the 6-month mark of the MATEC Clinician Scholars Program. Results will be analyzed and shared with LPs, who will be asked to develop action plans to address any concerns identified by Scholars.

The Mentor Midpoint Assessment Survey is a tool that offers Mentors the opportunity to rate the level of competency a Scholar has in each of the 11 Core Capabilities and 33 sub-competencies. Results will be analyzed and shared with LPs, who will be asked to develop action plans to address capabilities that the Scholar is developing capability or is minimally capable.

Endpoint Assessment Surveys

There are two endpoint assessment surveys: the Scholar Endpoint Assessment Survey and the Mentor Endpoint Assessment Survey.

The Scholar Endpoint Assessment Survey is a tool that offers Scholars an opportunity to provide a self-assessment of their knowledge, skills, and abilities related to HIV/AIDS care at the completion of the MATEC Clinician Scholars Program.

This tool will be administered up to two weeks prior to the Scholar's graduation from the program. LPs will be asked to ensure that their Scholars understand the importance of this evaluation tool and complete it as requested. Results will be compiled and shared with LPs, who will be asked to provide ongoing support, as appropriate, after program completion.

The Mentor Endpoint Assessment Survey is a tool that offers Mentors the opportunity to rate the level of competency a Scholar has on each of the 11 Core Capabilities and 33 sub-competencies. Results will be shared with LPs, and LPs will be encouraged to find other opportunities to assist Graduated Scholars in improving any capabilities that the Scholar is still developing capability or is minimally capable.

Transcript (Planning and/or Assessment Tool)

The MATEC Clinician Scholars Program Transcript is a multifunctional tool available through moXmi that allows LP Monitors and Mentors to track programmatic activities for each Scholar. MATEC programs attended by Scholars and reported in moXmi automatically update the Scholar's transcript. The Regional MAI Coordinator and Monitors are responsible for reporting Scholar activities in moXmi. For non-MATEC programming attended by a Scholar (e.g., external conferences, self-study) the Monitor should create an Event Record (ER) in moXmi and select "Non-MATEC" as the funding.

Scholar activities should be updated regularly by the Monitor in moXmi. The Regional MAI Coordinator and Monitor will monitor Scholar progress in moXmi monthly using the CSP Scholars Hours report. A printable version of the Scholar transcript can be downloaded from the CSP Scholar Hours report:

1. Select the LP in the “CLS LP” drop-down menu.
2. Select the cohort year in the “CSP Cohort” menu.
3. Set the start date to September 1st of the cohort year.
4. Set the end date to either the current date or August 30th if after the end of the cohort year.
5. Select “Yes” under “Attendance Verified”.
6. Click “Search”.
7. Click “Download Data”. This will download an Excel file.
8. If the LP has more than one Scholar, delete the rows of information for other Scholars or copy/paste the appropriate Scholar’s data into a new Excel document.

National Evaluation of MAI Programming (CORE)

In addition to the MATEC specific evaluation tools described in this section, all Scholars are strongly encouraged to participate in national evaluation activities for MAI programming. This includes the CORE Immediate-Post Survey (CORE-IP) administered by the Regional MAI Coordinator and/or LP following programs, as applicable, and/or the CORE Long-Term Follow-Up Survey (CORE-LT) administered by Central Office.

It is the expectation of Central Office that all Scholars will complete CORE-IP evaluations at all MATEC offerings, as well as the CORE-LT, as applicable. The CORE evaluation tools will provide a secondary source of data for evaluation purposes.

Continuous Quality Improvement

Continuous Quality Improvement (CQI) is the cornerstone of all MATEC programming. The CQI process for the MATEC Clinician Scholars Program includes, but is not limited to, the following activities:

- Check-ins during Regional Projects Meetings. These check-ins are dedicated to program planning and evaluation of the MATEC Clinicians Scholars Program. They are managed by the Regional MAI Coordinator and include representation from the Regional Leadership Team, the Regional Evaluation Team, and all the LPs. All LPs are responsible for staying up to date on information shared and decisions made that can significantly impact the functioning of the MATEC Clinician Scholars Program. LPs who are unable to participate in calls are responsible for reading meeting minutes and complying with changes made.
- Annual Meeting (as needed). This meeting is dedicated to program planning and evaluation of regional MAI programming, including the MATEC Clinician Scholars Program. The meeting will be managed by the Regional MAI Coordinator with support from the Central Office. MATEC’s Regional Medical Director is required to be in attendance. All LPs are responsible for staying up to date on information shared and decisions made that can significantly impact the functioning of the MATEC Clinician Scholars Program. LPs who are unable to participate in calls are responsible for reading meeting minutes and complying with changes made.
- Feedback from the Regional MAI Coordinator and Regional Evaluation Team. The Regional MAI Coordinator and Regional Evaluation Team will analyze data obtained via evaluation tools. This data will be shared with LPs as it becomes available. LPs will be asked to develop and report back on actions or action plans designed to address any concerns identified by Scholars.

- Feedback from Regional MAI Coordinator. The Regional MAI Coordinator will analyze transcript data at the 6-month mark. This analysis will be shared with LPs as soon as it is available. LPs will be asked to develop and report back on actions or action plans designed to address any concerns identified by the Regional MAI Coordinator.

Completion

Participants who successfully complete the MATEC Clinician Scholars Program will receive a certificate of completion. Participants who are unable to complete the program within 12 months may request a two-month extension to complete the program. The Regional MAI Coordinator, in collaboration with the LP Leadership, will determine whether to grant the extension.

Enrollment Protocol and Activity Timeline for Incoming (New) Scholars

Program Promotion

Ongoing

Designated staff from each LP will need to promote the MATEC Clinician Scholars Program. Marketing activities may include, but are not limited to:

- Brochures distributed at MATEC offerings
- Article in newsletter or other regular communication
- Email blast to targeted clinicians
- Post information on website about the MATEC Clinician Scholars Program

Screening Meetings

May – June Annually

Monitors should have a brief meeting (in person or virtually) with clinicians who are interested in applying for the MATEC Clinician Scholars Program. At this meeting, LP staff should:

- Describe the MATEC Clinician Scholars Program
- Explain the eligibility criteria to apply for this program
- Review the requirements for participants to successfully complete the program
- Assess the clinician for a basic understanding of HIV and eligibility for the program

If a candidate does not meet the eligibility criteria and/or the timeline does not work for them, explain how other MATEC programs and resources could support them.

Applications

May – July 15 Annually

If a candidate meets eligibility criteria and is committed to the program timeline (or wants to think about it), provide them with a link to the MATEC Clinician Scholars Program application page on the MATEC regional website. This page will be active around May 1 annually.

The application package includes:

- Online registration in moXmi, including Participant Information Form (PIF)
- Application
- Resume/Curriculum Vitae
- Statement of Workplace Endorsement
- Letter of Reference (strongly recommended)

LP Review Process

By July 25 Annually

All applications must be reviewed by the LP Leadership (Programmatic and Clinical). The LP must complete the LP Applicant Review Form for each applicant that the LP is interested in accepting into the program and submit it by July 25 for regional review.

If an LP receives an applicant that they do not wish to accept into the program, they do not need to complete an LP Applicant Review Form for that applicant. The LP will email the Regional MAI Coordinator with the name of any applicant they do not wish to accept and why they do not wish to accept them.

Regional Review

By July 31 Annually

A Regional Review Committee including regional and LP clinical and administrative leadership will review all applications and accompanying LP Applicant Review Forms. The committee will report back to LPs on issues, questions, or concerns. The ultimate decision of acceptance is made at the regional level. An LP cannot accept an applicant who the Regional Review Committee rejects from the program. However, an LP can choose to not accept an applicant approved by the Regional Review Committee if they have more applicants than available Scholar slots.

LPs will receive email notification of Regional Review findings around July 31.

Notification/Acceptance

By August 10 Annually

Applicants should be notified by email of whether they were accepted into the MATEC Clinician Scholars Program. This email will be prepared by LPs using templates provided in Box. This letter should outline the enrollment process for those accepted into the program and extend an invitation to participate in other MATEC programming for those not accepted into the program.

Enrollment

By August 25 Annually

Applicants accepted into the MATEC Clinician Scholars Program must be enrolled by their LP. It is highly recommended that the enrollment process be conducted in person. The enrollment process includes:

At the LP Level:

- Sign the Statement of Commitment.
- Introduce Scholar to Monitor and Mentor (when possible).
- Explain the roles of the Monitor and Mentor.
- Review the requirements for participants to successfully complete the program.
- Review sample syllabus.
- Remind Scholars to complete their baseline self-assessment survey.

At the Regional Level:

- Send the baseline self-assessment survey to all incoming Scholars.
- Send a welcome email with information on how to register for the Immersion Institute and sign up for a case presentation slot.
- Send calendar holds to all Scholars for the MATEC Clinician Scholars Program Immersion Institute and Collaborative Learning Series.

LPs will be included on email communications to the Scholar and will be asked to encourage prompt completion by their respective Scholars. The baseline self-assessment survey, registration for the MATEC Clinician Scholars Program Immersion Institute, and signing up for a case presentation slot must be completed before the start of the Immersion Institute in late September. Monitors will be notified if their Scholar has not completed these requirements by the Monday before the Immersion Institute. Scholars who do not complete these requirements before the Immersion Institute will be discussed between the Regional MAI Coordinator and the Monitor to determine next steps, up to discussing the appropriateness for the Scholar to continue in the program.

Monitor and Mentor Check-In | Monthly September - August

The Monitor and Mentor should be interacting with Scholars monthly beginning in September through August of the following year. These interactions include, but are not limited to, check-in meetings, case discussions or clinical consultations, clinical preceptorships, resource sharing, networking events/opportunities, or other technical assistance. These interactions can be done in-person or by phone, email, or text. Monitors should report clinical consultations, clinical preceptorships, and in-person or virtual meetings between the Mentor and Scholar in moXmi. Other interactions should be reported by Monitors in the monthly report.

Immersion Institute | September Annually

All Scholars are **required*** to attend and participate in all elements of the MATEC Clinician Scholars Program Immersion Institute, a two-day didactic and case-based series of programs on HIV/AIDS topics aimed at starting their journey of reaching intermediate knowledge of the 11 Core Capabilities addressed in the MATEC Clinician Scholars Program. A limited number of Scholars may also present their required case during the Immersion Institute.

**This requirement may only be waived when an emergency or other unforeseeable event prevents a Scholar from participating. In these situations, the Regional MAI Coordinator should be contacted immediately.*

Collaborative Learning Series | Monthly December - July

All Clinician Scholars are **required** to attend and participate in at least five of the sessions of the Clinician Scholars Program Collaborative Learning Series. Each session includes a didactic presentation on an HIV-related topic, followed by Scholar case presentations. Sessions are hosted on the second Tuesday of each month from 4:00 PM – 5:30 PM CT / 5:00 PM – 6:30 PM ET.

Midpoint Review | March Annually

The Regional MAI Coordinator will send all Scholars a Scholar Midpoint Assessment Survey and review each Scholar's transcript in moXmi. Monitors will send the Mentor Midpoint Assessment Survey to their Mentors. LPs may be asked to reach out to Scholars and/or Mentors who do not complete their Midpoint Assessment Survey in a timely manner. Transcripts and surveys will be reviewed, and feedback will be submitted to LPs in April.

Completion Protocol and Timeline for Outgoing (Graduating) Scholars

Endpoint Assessment Surveys | Starting August 15 Annually

The completion process includes Scholars completing the Scholar Endpoint Assessment Survey and Mentors completing the Mentor Endpoint Assessment Survey. The links for these surveys will be sent to Scholars who have completed their course of study by the Regional MAI Coordinator and to Mentors by the Monitors starting August 15.

Acknowledgement Activities | Starting September Annually

The Regional MAI Coordinator will send Certificates of Completion to Monitors after Scholars have completed all program requirements or after August 31, whichever comes later. The LP is encouraged to frame the certificate and present it to the Scholar in-person. Additionally, LPs are encouraged to celebrate their graduated Scholars. Celebration activities can include, but are not

limited to, recognizing the Graduated Scholar at an LP-hosted event or conducting a special training program for the graduated Scholar and their clinic.

Accessing Program Documents

LPs can access the following program documents for the MATEC Clinician Scholars Program through the regional MATEC Staff Login page:

- MATEC Clinician Scholars Program Brochure
- MATEC Clinician Scholars Program Guidance Document
- Collaborative Learning Series and Case Presentation Tracking Form
- Scholar Applicant and Cohort Tracking Form
- Acceptance/Rejection Letter Templates
- Sample Mentor Guidance Document
- Sample MATEC Clinician Scholars Program Activities and Timeline
- Sample Syllabus
- Collaborative Learning Series Calendar and Training Topics

Appendix A: History of the MATEC Clinician Scholars Program

The Midwest AIDS Training + Education Center (MATEC) developed the MATEC Clinician Scholars Program as part of an effort to reinvent the region's Individualized Clinician Training Program (ICTP). -The process of reinvention began at the April 2009 Site Directors Meeting where the need to “tighten up” or “formalize” the ICTP was discussed and the decision was made to “standardize the ICTP and to incorporate discipline-specific curriculum.”

Under the leadership of Malinda Boehler, MSW, LCSW, (Director, MATEC-Indiana and Regional Coordinator of the MATEC Clinician Scholars Program) the ICTP Standardization Workgroup was established, and three teams respectively focused their work in the following areas: (1) Intake, (2) Content/Curriculum, and (3) Follow-up/Monitoring/Closure/Completion. All three teams were committed to developing a new longitudinal program that was structured, scholarly, and highly professional.

In May 2010, the teams reconvened at a face-to-face meeting in Chicago to present and discuss their work. At this meeting, it was decided to name the program as the “MATEC Clinician Scholars Program” and that no acronyms will be used to refer to it. -However, in the years that have followed the program is commonly referred to as “CSP.”

Additionally, at the May meeting, the workgroup came to a consensus on the guidance set forth to transition ICTP participants out of the program and into the new program, and that as of July 1, 2010, MATEC Clinician Scholars Program would officially replace the ICTP. Guidance on transitioning from ICTP to Clinician Scholars was provided to Local Partners (LP).

This document compiles the work done by all three teams. It also reflects additional decisions and agreements that have been made over the years to accommodate the needs of the region, the LPs and our Clinician Scholars cohorts. It provides standardized guidance for LPs to implement the MATEC Clinician Scholars Program.

The first cohort of the MATEC Clinician Scholars Program was recruited in MATEC fiscal year (FY) 11 (July 1, 2010-June 30, 2011).

As part of this preface, it is important to acknowledge the team members who have focused so much time and effort on this regional program.- Their names are listed on the following page, but special thanks are due to Malinda Boehler, who spearheaded the project and pushed it through to its current point.

This kind of regional teamwork can only succeed with active partners from within LPs and strong leadership. The activities of the group have set a new standard for regional synergy that we look forward to replicating for other important programs.

ICTP Standardization Workgroup
Malinda Boehler – Workgroup Leader

Intake Team
Ricardo Rivero – Team Leader
Michelle Agnoli
Malinda Boehler
Beth-Anne Jacob

Content/Curriculum Development Team

Mary Rose Forsyth – Team Leader
 Michelle Agnoli – Co-Team Leader
 Catherine Creticos
 Sally Neville
 Renslow Sherer
 Marge Sutinen

Follow-up/Monitoring/Closure/Completion Team

Carolyn Prim - Team Leader
 Cheryl Carter
 Alicia Downes
 Beth-Anne Jacob
 Amanda Wilkins

The Clinician Scholar Program guidance and associated documents are reviewed and revised annually by the Regional Coordinator, with input from the LPs in the region. A summary of changes to the original program are as follows: changing the format of the monthly MATEC Clinician Scholars Program calls to include a review of program elements.

During FY19 (July 1, 2018 – June 30, 2019), the MATEC Clinician Scholars Program underwent regional review in preparation for the next five-year grant cycle. This review resulted in the following:

- Changing the title of the Regional Clinician Scholars Program Coordinator to the Regional Minority AIDS Initiative (MAI) Coordinator
- Clarifying the role of the Regional Review Committee
- Revising the eligibility guidelines, particularly regarding students and clinicians participating in infectious disease training programs
- Adjusting the timeline of the program from July 1 to June 30 annually to September 1 to August 31 annually

During FY21 (July 1, 2020 – June 30, 2021) and 22 (July 1, 2021 – June 30, 2022), the MATEC Clinician Scholars Program made additional changes, partially in response to the COVID-19 global pandemic. The changes included the following:

- Utilizing moXmi for maintaining the Scholar transcript.
- Change from a two-day, in-person program orientation to the two-day MATEC Clinician Scholars Program Immersion Institute.
- Offering at least seven regional webinars (previously four) of the newly developed MATEC Clinician Scholars Program Collaborative Learning Series.
- Requiring Scholars attend at least five regional webinars (previously 1 of the Collaborative Learning Series).
- Requiring Scholars sign up to present a case during the Immersion Institute or Collaborative Learning Series session during enrollment.
- Providing Mentor contact information with both the Scholar and Regional MAI Coordinator during enrollment.