



American College of  
Preventive Medicine

2021-2022 Preventive Medicine Application Cycle  
Standardized Acceptance Process (SAP) for  
Public Health/General Preventive Medicine (PH/GPM) Residency

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Key Dates

Activity	Date
Indicate participation in the SAP	September 17 – 30
Info session for Programs (email <a href="mailto:sap@acpm.org">sap@acpm.org</a> for recording)	Friday, November 12
Info session for Applicants ( <a href="#">recording</a> available)	Friday, November 19
LAST DAY for Programs to register on the SAP website	Wednesday December 1, 11:59 PM ET
<b>ACPM offices closed (No updates to SAP webpages until January 3)</b>	<b>December 24 – January 2</b>
LAST DAY for Applicants to register on the SAP website	Friday, January 21, 2022 11:59 PM ET
Applicants submit their rank list on the SAP website	January 24 – 28
Programs submit their rank list on the SAP website	February 1 – 4
Program/Applicant SAP Pairing Period	February 7 – 11
Initial Notification Meeting	Monday, February 14
ACPM notifies the Programs ONLY of the SAP results ahead of the video conference	9:00 am
PDs/PCs participate in the video conference, and raise questions/concerns, if any. "Mini-audits", if needed.	10:00am – 1:00pm ET
ACPM posts SAP results to the SAP Website	Monday, February 14
Website results available to Programs and Applicants based on user role- PDs see programs, slots, and Applicant names... Applicants see Programs and slots	2:00pm Eastern
Programs formally extend offers to their paired/matched; Applicants accept offers from their paired/matched; Applicants accept offers from their paired/matched Programs; Programs notify ACPM of formal offer/acceptance	
ACPM releases list of unpaired Applicants to unfilled Programs; and list of unfilled Programs to unpaired Applicants (per Program/Applicant request).	
Unfilled Programs and Unpaired Applicants contacts; interviews; and offers/acceptances. Notify SAP if/when offer is accepted, and SAP rules apply for posted/accepted offers.	February 14 – 25



## American College of Preventive Medicine

### **2021-2022 Preventive Medicine Application Cycle Standardized Acceptance Process (SAP) for Public Health/General Preventive Medicine (PH/GPM) Residency**

This document outlines rules and procedures for ALL PUBLIC HEALTH & GENERAL PREVENTIVE MEDICINE RESIDENCY PROGRAMS, who are recruiting candidates during the 2021/2022 application cycle<sup>1</sup> and who are eligible to participate in the American College of Preventive Medicine Standard Acceptance Process (ACPM-SAP).

At this time, the ONLY types of Programs that have been deemed able to “waive” participation in the SAP completely, and designate themselves as “not eligible” are: military Programs; PH/GPM Programs that do combined NRMP match with another specialty; and Programs who EXCLUSIVELY recruit and hire Applicants employed at their OWN institutions (e.g., hospital, university, or government agency) at the time of application, and do NOT interview or extend offers to anyone from outside of their institution. This “intra-institutional” model does NOT include Programs with an institutional or geographic “preference”; it refers only to an institution that exclusively recruits candidates from within that institution.

In addition, it is expected that those Programs that require their Applicants to have completed a previous residency prior to matriculation in their PH/GPM residency Program, so-called “fellowship model” Programs, are expected to participate in the ACPM-SAP. While Programs are free to set whatever admissions/acceptance criteria they deem appropriate, it is expected that such Programs will participate in the ACPM-SAP, even if such Programs have grant funding (e.g., from the Health Resources and Services Administration (HRSA)) which requires funded residents to have completed a prior residency Program.<sup>2</sup>

It is recognized that due to external influences (lack of funding, etc.) a Program that is otherwise eligible and expected to participate in the ACPM-SAP may elect to not recruit any Applicants in a given academic year application cycle. Programs who are NOT recruiting/hiring any residents in a given year are not expected to participate in the SAP but are expected to notify ACPM that they will not be recruiting/hiring during the application cycle.

This document governs the PH/GPM residency Program application process generally, and specifically, the terms and conditions of participation in the ACPM-SAP. Please note that the

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<sup>1</sup> (i.e., applying during the 2021/22 Academic Year for matriculation into a PH/GPM residency on or about July 2022)

<sup>2</sup> There is no “Preventive Medicine Fellowship” recognized by the American College of Preventive Medicine (ACPM), the Accreditation Council for Graduate Medical Education (ACGME) or the American Board of Preventive Medicine (ABPM)

ACPM-SAP for a given year only pertains to positions which are to begin within the next June 1 – September 30 window.

Note that IT IS THE EXPECTATION OF ACPM, THE ACPM GRADUATE MEDICAL EDUCATION (GME) SUBCOMMITTEE, AND THE ACPM RESIDENCY PROGRAM DIRECTORS' GROUP THAT ALL PROGRAMS THAT ARE ELIGIBLE TO PARTICIPATE IN THE ACPM SAP WILL PARTICIPATE IN THE ACPM SAP.

1. Between September 17 and 30, program directors should send an email to [SAP@acpm.org](mailto:SAP@acpm.org) notifying ACPM that they:
  - a. Are an ACPM-SAP-eligible Program;
  - b. Will be recruiting Applicants in the 2021/2022 academic year application cycle; and
  - c. Will be participating in the 2021/2022 ACPM-SAP.
2. Programs who are NOT going to participate in the ACPM-SAP (for one of the reasons delineated above) should also notify ACPM by emailing [SAP@acpm.org](mailto:SAP@acpm.org) between September 17 and September 30.
3. A Program whose funding is uncertain is expected to either: a) presumptively register for the ACPM-SAP, and follow the ACPM-SAP recruiting process, but only offer positions if their funding has been secured, AND provide Applicants with adequate, detailed disclosure about the uncertainty of their Program's funding status; or alternatively b) register with the ACPM-SAP but refrain from any recruitment activities until their funding status is more certain.
4. **Participating Programs should register, indicate the number of categorical<sup>3</sup> residency positions they plan to offer, and pay for the ACPM-SAP through the ACPM-SAP website by December 1, 2021.** Each Program will pay a flat registration fee of \$250.00 to ACPM. Programs will be given the option to be listed as “still seeking candidates to fill an open position” if they do not fill all of their available slots in the ACPM-SAP. This listing will be provided to Applicants who remain unpaired after the initial posting of SAP results.
5. All categorical positions a participating Program plans to offer should be offered through the ACPM-SAP; it is an “all-in” system, unless they meet one of the exceptions outlined in a separate document, APPENDIX A – Formal Exceptions and Special Considerations Relative to the ACPM-SAP Policy.
6. The names of participating Programs and the number of categorical residency positions each plans to offer will be posted on a publicly-accessible web page maintained by ACPM. A link to this web page will be placed on the “Residency Programs” section of the ACPM website and shared separately with program directors. As Programs register and pay, Program names will be added to the publicly accessible ACPM-SAP web

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<sup>3</sup> The term “categorical” as used in this document refers to Programs that do not combine PH/GPM training with training in another specialty.

page. The names of Programs that have not yet paid but that can demonstrate that payment is in process through their institutions will be added to this web page.

7. Programs may increase the number of positions posted if additional funds or other capacity will enable more positions to be offered in the current recruiting season. Programs may decrease the number of positions posted if changes in funding or other capacity necessitate, or if one or more available training slots are awarded to military trainees with permission to pursue civilian residency training (i.e., “military out-placement”). To make any such change after Programs have registered and paid for their participation, please contact [SAP@acpm.org](mailto:SAP@acpm.org) and describe the rationale for the change.
8. **Applicants applying to participating Programs will be required to register with ACPM by January 21, 2022.** There is no fee for Applicants to register or to submit rank lists. To register, Applicants will be asked to provide: full name; date of birth; at least one email address; and at least one phone number where they can be reliably reached during the ACPM-SAP. They will receive information about the ACPM-SAP at the time of registration and periodically throughout the recruiting season. The Applicants will NOT be assigned any registration numbers. Applicants will be given the option to be listed as “still seeking a position” if they are not paired with a Program by the ACPM-SAP. This listing of unpaired Applicants will be provided to Programs who remain unfilled after the initial posting of ACPM-SAP results.
9. **In order to participate in the ACPM-SAP pairing process, Applicants must submit their rank lists for the ACPM-SAP on the ACPM website between Monday, January 24 and Friday, January 28, 2022 by 11:59PM Eastern Time (ET).** Applicants’ rank lists should ONLY rank Programs to which the Applicant is willing to enter, beginning with the most preferred. Once paired with a Program through the ACPM-SAP, Applicants **are not permitted to pursue a position with another Program**. Applicants will receive a confirmation email confirming their rank list, once submitted. This confirmation email will serve as their proof of submission. This will constitute the Applicant’s “Applicant’s Rank Order List” or “AROL”.
10. **In order to participate in the ACPM-SAP pairing process, Programs must submit their rank lists showing their most preferred candidates beginning Tuesday, February 1<sup>st</sup>, through Friday, February 4<sup>th</sup>, 2022 by 5:00PM ET.** Rank lists will be submitted via the ACPM website where the Programs can choose from all the candidates who have registered by the registration deadline and who have submitted rank lists. Programs will only be able to see that an Applicant has submitted a rank list, but NOT the details of the Applicant’s rank list. Programs will receive a confirmation email that will serve as the Program’s confirmation of submission. This will constitute the Program’s “Program’s Rank Order List” or “PROL”.
11. Between the Rank List Submission Date(s) and the Initial Notification Day, **there will be a Program/Applicant Pairing Period (Monday, February 7 – Friday, February 11),** during which the Program/Applicant Pairing Team will pair Applicants and Programs to

the highest mutually ranked Program/Applicants on their lists, using the algorithm in Appendix B.

- a. The Program/Applicant Pairing Team shall consist of:
    - i. A designee(s) from ACPM staff **AND** at least two (2) of the following:
      1. A designee(s) from the Education or the Membership Committee who is NOT a program director or Program faculty member, OR
      2. A former PM residency program director who is not formally connected to any PH/GPM residency Program, OR
      3. A designee(s) from the Committee on Ethics (Team Lead), OR
      4. A designee selected by the ACPM Board of Regents or Executive Committee, OR
      5. A designee(s) who is a young physician.
12. NO PROGRAM/APPLICANT PAIRING TEAM MEMBERS SHOULD HAVE ANY ACTIVE FORMAL TEACHING AFFILIATION WITH ANY PH/GPM RESIDENCY PROGRAMS.
13. The Program/Applicant Pairing Team will generate an Initial Program/Applicant pairing list, utilizing the ACPM-SAP pairing algorithm (Appendix B).
14. **On the Initial Notification Day, Monday, February 14, 2022**, the Program/Applicant Pairing Team, or its designee(s) will conduct a **real-time video-conference from 10:00AM ET to 1:00PM ET**. The Initial Program/Applicant Pairing List will be shared at 9:00 AM ET with all participating Programs (Program Directors or Program Coordinators), ahead of the video conference in a confidential manner.
- a. If a Program has a *bona fide* reason to believe that a mistake has been made in the pairing process, then a brief “time out” can be taken in order to do a “mini audit” of the result in question, to be done during the real-time videoconference, and to be completed prior to the posting of the Initial Program Pairing List. The “mini-audit” will share ONLY enough information to verify the specific pairing result in question (e.g., that a specific Applicant was matched into another Program, which the Applicant ranked higher than the Program that requested the mini-audit), without sharing unnecessarily excessive information about the Applicant’s or Program’s rank order lists. Note: This is NOT a mechanism to replicate the entire pairing process for every Program and Applicant and a “mini audit” should ONLY be requested when a Program strongly believes that a mistake has been made with respect to a specific Applicant or Applicants. If it becomes apparent that a program is “abusing” or “overusing” such mini-audits for all or most of the applicants on their rank list, then the Program’s ability to request such mini-audits may be suspended, at the discretion of the PAPT Team Leader, their designee, or ACPM staff, with the concurrence of the Program Directors/Coordinators participating in the video conference call. If a mistake is identified, then the Program/Applicant Pairing Team must determine if the

mistake was an isolated one, or whether it might impact other pairings (e.g., have a “cascade effect” on the rest of the SAP). If there is any concern that an identified error might have impacted any other SAP pairings, then the Program/Applicant Pairing Team reserves the right to suspend the SAP, re-run the algorithm, and reschedule the notification videoconference until a later date, which may in turn delay the posting of the results of the Initial Program/Applicant Pairing List to the SAP website.

- b. Assuming no such errors are identified during the Notification Day videoconference, then, **at 2:00PM ET**, the results of the Initial Program/Applicant Pairing List (i.e. matches) will be posted to the SAP website, and be available to both Programs and Applicants on a role-specific basis, as noted. Programs will see all Programs, open and filled positions, and Applicant names. Applicants will be able to see the list of Programs and the remaining unfilled slots.
15. Upon posting of the Initial Program/Applicant Pairing List results to the SAP website at **2:00PM ET on Notification Day, Monday, February 14** the designated pairings are final. ACPM staff WILL NOT notify the Programs individually by email nor will they extend the offers to the Applicants. **Programs are expected to extend offers to Applicants with whom they have been paired, and Applicants are expected to accept the offers from Programs with whom they have been paired.** Programs are expected to extend their formal offer (preferably by email) to the paired Applicant no later than **4:00PM ET**. **Applicants will receive ONLY ONE OFFER from the Program to which they have been paired/matched.** Applicants are expected to accept the offer **within two hours of the offer being made by the Program.** Once an offer has been accepted by an Applicant, the Program will notify the ACPM SAP via email, with the Applicant copied.
  16. If an Applicant should decline an offer made via the ACPM-SAP, **that Applicant may NOT contact, interview with, entertain or accept offers from, or otherwise be in communication with any PH/GPM Programs other than the Program with whom they were paired in the SAP.**
  17. Programs may NOT contact, interview, extend offers to or otherwise be in communication with Applicants who have been paired with another Program (other than to congratulate them on their pairing).
  18. Applicants may NOT contact, interview with, entertain or accept offers from, or otherwise be in communication with any Programs other than the Program with whom they were paired in the SAP (other than to accept congratulations on their pairing).
  19. Upon posting of the Initial Pairing List, ACPM will also post/distribute a “List of Programs still seeking candidates to fill an open position” to all Applicants who went unpaired in the Initial ACPM-SAP Pairing, as well as a “List of Applicants still seeking a position” to all Programs with remaining/unfilled slots after the Initial ACPM-SAP Pairing, pursuant to the previously noted prior authorizations from programs and

applicants respectively. Such unpaired Programs and Applicants are free to contact, interview, extend/accept offers to or otherwise be in communication with each other with an eye toward filling open slots and securing a training slot. Only one offer may be pending at any given time for each available residency position.

20. When Programs extend an offer of a vacant slot to an available Applicant who is still seeking a position, and the Applicant accepts the offer, the Program should notify ACPM by sending an email to [sap@acpm.org](mailto:sap@acpm.org) (copying the candidate) so that the slot and Applicant can be reflected as paired on the ACPM-SAP website, and the Program slot and Applicant can be removed from the above-referenced lists of available slots and Applicants seeking positions. Other Programs will therefore be notified via the SAP website posting that the Applicant is no longer available for contact, interviews, offers or other related communications. ACPM will continue to update the ACPM-SAP website through **Friday, February 25, 2022, at 5:00PM ET.**
21. **No offers may be made by ANY SAP-eligible PH/GPM Programs prior to posting of the initial SAP pairings on the SAP website on the Initial Notification Day,** except as noted in APPENDIX A – Formal Exceptions and Special Considerations Relative to the SAP Policy.
22. Offers should be made and accepted by email, to facilitate the above-referenced ACPM-SAP documentation. Programs may also contact Applicants by phone, text message, or other means, but such other means are best used to informally welcome an Applicant and bring their attention to the offer email.
23. When an Applicant accepts an offer for a residency position, that Applicant may not accept any other offers and that position cannot be offered to any other candidate.
24. If an offer is declined, the Program may immediately offer that spot to any Applicant whose name appears on the “List of Applicants still seeking a position” AND whose name does not yet appear on the ACPM-SAP website as having been paired with another Program, i.e., “available candidates”. Programs are NOT permitted to offer an unexpectedly vacant slot (e.g., because an Applicant declines an offer) to an Applicant who is listed on the SAP website as already having been paired with another Program.
25. If a candidate fails to accept or decline an offer within 2 (two) hours of receipt of the offer, the program making the offer may (but is not required to) withdraw the offer and may, at the Program’s sole discretion immediately offer the position to another available candidate. Programs, at their sole discretion, may extend this two hour response period for applicant to whom the offer is made. But this should be for a specific period of time and documented in writing by the program via email to the applicants.
26. When an offer for a position in a participating Program is accepted, the Program should immediately report the resident’s name, and the Program name to ACPM by emailing [SAP@acpm.org](mailto:SAP@acpm.org); the accepted candidate should be copied on this email. ACPM staff will record the institution, candidate, and date and time at which ACPM was notified on

a restricted web-page accessible by participating Program Directors. When a candidate accepts an offer, any offer from another Program to that candidate is then considered declined by the candidate and rescinded by the Program; that Program can immediately offer the spot to another available candidate.

27. Unless a Program meets one of the clearly delineated exceptions noted above and in Appendix A - Formal Exceptions and Special Considerations Relative to the SAP Policy, all PH/GPM Programs are expected to participate in the SAP process and honor the SAP dates and timelines and are asked not to make an offer until the ACPM SAP Initial Notification Day, as noted above. This is in the best interest of the Applicants so that they can consider all the potential offers and decide about their residency program within the same timeframe. It also benefits all residency programs, and the specialty as a whole, as it presents an organized and orderly approach to the GPM/PH application process. Finally, and most importantly, this is deemed the most equitable process from the perspective of the Applicants.
28. ACPM staff will monitor the [SAP@acpm.org](mailto:SAP@acpm.org) account continually from 9:00 am to 6:00 pm Eastern Time on the Initial Notification Day and for the first two business days after the ACPM SAP Initial Notification Day, and hourly (at most) for the next five business days thereafter. Subsequently, the email will be monitored daily for any new updates for a period of up to two weeks (10 business days) after the Initial Notification Day, at which time a Final Program/Applicant Pairing List will be posted to the ACPM SAP website on Monday, February 28, 2022. Accepted offers will be posted to the Programs-only web page as soon as they are received by ACPM staff. At the same time, ACPM staff will update the publicly-available web page to reflect any open positions still available within participating Programs.
29. During the interview process, Programs may express their level of interest in candidates but should not discuss their intentions or plans regarding ranking or making offers, except as noted in APPENDIX A – Formal Exceptions and Special Considerations Relative to the SAP Policy.
30. A Program may rescind an accepted offer: a) If the Applicant fails to satisfy prerequisite requirements for beginning the residency, including admission to the Program's partner school of public health or completion of prerequisite clinical training; b) If the Program is unable to fund salaries or other expenses related to the position; c) If the Applicant is found to have interviewed with other Programs (or fails to provide evidence of withdrawing from the NRMP) after an acceptance has been registered with ACPM; d) If the Program learns that the Applicant has interviewed or accepted an offer from another (non-PH/GPM) residency or another employer; or e) If the Program learns of material misrepresentations or omissions by the Applicant during the application process that would substantively change the Applicant's candidacy or ability to matriculate into the Program.





## **APPENDIX A – Formal Exceptions and Special Considerations Relative to the SAP Policy**

**This Appendix A to the ACPM SAP Policy outlines very specific instances in which a SAP-Eligible Program may, with written notice to and permission from the ACPM Graduate Medical Education Subcommittee (that oversees the SAP):**

**Scenario A) Have more than one listing in the ACPM-SAP;**

**Scenario B) Offer a future position (i.e., not during the then-current application cycle, for placement into the next standard matriculation date, on or about the next July) to an Applicant “early” and/or reserve a spot for an Applicant, and in so doing, NOT offer that slot during a specified future application cycle, based on an existing intra-institutional arrangement between two or more Programs and the Applicant;**

**Scenario C) Make an “early” offer to a resident during the then-current application cycle (i.e., for placement into the next standard matriculation date, on or about the next July) because the Applicant is concurrently applying to another type of residency (e.g. Occupational Medicine) or fellowship (e.g. Internal Medicine, Family Medicine, or Pediatric fellowships) with “match dates” occurring prior to the ACPM-SAP; or**

**Scenario D) Make an “early” offer to an internal (i.e., within the same hospital or health system) candidate, wishing to make a “lateral” transfer from an internal Program that the Applicant will not be completing, or a seamless transition from an internal Program that the Applicant will be completing.**

**Scenario A: There may be instances in which a Program may wish to have more than one listing in the ACPM-SAP.** For example, a Program may have two open slots, but only enough funding for one MPH, and therefore restrict one of its slots to only Applicants with MPH or equivalent degrees. [Note: this should represent a *bona fide* and verifiable funding constraint and should NOT merely represent a Program’s preferences in admissions criteria.] Such a Program may ask ACPM to provide it with two “Program listings”, such as: 1) “XYZ Residency Program”; and 2) “XYZ Residency Program (“ reserved for Applicants already possessing an MPH”. Similarly, a Program that, due to grant funding restrictions (e.g., the current HRSA “Maternal and Child Health” grant) might have two open slots, but one of them is restricted to Applicants who have already completed a prior primary care residency. Such a Program may ask ACPM to provide it with two “Program listings”, such as: 1) “XYZ Residency Program”; and 2) “XYZ Residency Program (“reserved for Applicants who have already completed a primary care residency”). [Again, this should be based on a *bona fide* and verifiable funding restriction, such as a specific set of grant requirements, and NOT merely represent a Program’s preferences in admissions criteria. If a Program has an “admissions preference” to only accept applicants who already possess an MPH or who have already completed a prior residency, then those preferences should simply be reflected in the Program’s published admissions criteria/preferences, interview selections, and rank order lists.] In such instances of *bona fide*,

verifiable admissions restrictions, ACPM will provide the Program with a second Program listing, and process that listing as if it were a “separate Program” participating in the ACPM-SAP and do so at no additional charge to the Program. HOWEVER, the Program and its Applicants will remain solely responsible for designating the correct/appropriate Applicants and Program Listings (respectively) in their rank order lists, and ACPM will specifically NOT validate that Applicants listed by Programs in a special Program listing (e.g., having an MPH) meet the criteria for that Program listing, or that Applicants meet the criteria for a special Program listing (e.g., having an MPH) that an Applicant lists on their rank order list. Qualifying for, and/or ranking a Program with such a “special Program listing” (e.g., possession of an MPH) does NOT preclude an Applicant from applying to and ranking any other Program in the SAP, including the “regular” slot of the Program with the “special listing”, and indeed Applicants are encouraged to apply (and rank, as may be appropriate) to any and all Programs that they are interested in, and whose admission criteria they meet. To that end, having more than one listing in the ACPM-SAP does NOT, in and of itself, permit the Program to: remove the slot from the SAP process; make an “early offer” prior to the normal SAP notification process (although Programs can and should advise Applicants which of the Program’s slots the Applicant is eligible for); or to compel an Applicant to accept an early offer by the Program, and refrain from applying to any other Programs.

**Scenario B: There may be instances when a Program would like to offer a future position (i.e., not during the then-current application cycle, for placement into the next standard matriculation date, on or about the next July) to an Applicant “early” and/or reserve a spot for an Applicant, and in so doing, NOT offer that slot during a specified future application cycle, based on an existing intra-institutional arrangement between two or more Programs and the Applicant.** [Note: This is NOT the scenario in which the PH/GPM Program has a COMBINED ACGME residency with another training Program, and in turn recruits through a COMBINED NRMP process, as those Programs are already listed above as being excluded/exempted from the ACPM-SAP process.] Examples of such pre-existing, intra-institutional arrangements might include, but not necessarily be limited to: when a PH/GPM Program has a pre-existing, intra-institutional arrangement, with a “Preliminary” or “Transitional” Year Program at the same institution, by which the two Programs collaborate on admissions, agree to “hold in reserve” a certain number of preliminary or transitional year slots, for Applicants deemed mutually acceptable to both Programs, and who make a prior commitment to the Applicant, that if the Applicant successfully gains admission to and completes the PGY-1 preliminary or transitional year at the institution, that the Applicant will be “guaranteed” a PGY-2 slot in the institution’s PH/GPM Program. A similar, but not identical scenario, would be one in which a PH/GPM Program has a pre-existing, intra-institutional arrangement with other residency or fellowship Programs (e.g. Family Medicine, Internal Medicine, Pediatrics.) which is not a combined Program, but is one in which early-identified residents, not in the then-current application cycle (i.e. not in or soon-to-enter their last year of training) express a desire to pursue PH/GPM training at that institution, and the Programs at that institution have a pre-existing arrangement (note: NOT a combined residency) that the non-PH/GPM Programs will promote the PH/GPM Program, and perhaps provide protected time for their trainees to pursue the institution’s MPH and/or undertake elective rotations with the PH/GPM Program, and in

return, the PH/GPM Program offers preferential admissions consideration, or even a “guaranteed” training slot, upon successful completion of the initial residency/fellowship and/or the MPH Program. In such instances, the PH/GPM Program may make an “offer” to such internal candidates and notify ACPM of its intent to remove that slot from the future/specified application cycle and SAP process, which should NOT be the then-current SAP cycle. In such instances as noted in this section “Scenario B”, the Program should notify ACPM as soon as the candidate is identified, and provide the ACPM with: the name of the resident/Applicant; the other intra-institutional Program with whom the PH/GPM Program has the pre-existing arrangement; the application cycle or SAP-year from which the Program would like to withdraw its SAP slot; and the anticipated PH/GPM residency matriculation date of the resident/Applicant in question. If the PH/GPM Program or its host institution is providing the resident/Applicant something of tangible value (e.g., a PGY-1 Year, tuition benefits, protected time to pursue their MPH etc.), then it is permissible for the PH/GPM Program to, in return, request/require the resident/Applicant to sign a letter of commitment to attend the PH/GPM Program upon successful completion of the above-noted (or other applicable) pre-requisites. It should be noted, however, that this would be a contract or letter of commitment that is exclusively between the PH/GPM Program, the Resident/Applicant, and possibly including the other intra-institutional Program, and/or the host institution. ACPM will NOT be a party to any such contracts or letters of commitment. If the PH/GPM Program or its host institution are not providing the resident/Applicant something of tangible value as noted above, but has simply identified a candidate/Applicant early in the process of the candidate/Applicant investigating opportunities in PH/GPM, then the Program should not request/require the resident/candidate/Applicant to sign a letter of commitment to attend the PH/GPM Program, and should not seek to prevent the resident/candidate/Applicant from exploring other training opportunities.

**Scenario C: There may be instances in which a PH/GPM Program may have a *bona fide* need to make an “early” offer to a resident during the then-current application cycle (i.e. for placement into the next standard matriculation date, on or about the next July) because the Applicant is concurrently applying to another type of residency (e.g. Occupational Medicine) or fellowship (e.g. Internal Medicine, Family Medicine or Pediatric fellowships) with “match dates” occurring prior to the ACPM-SAP, and to delay such communication to the Applicant could cause the Program, the SAP and the specialty to “lose” the Applicant, simply because the Applicant felt pressured or compelled to accept the earlier “sure thing” training Program, and then not wait for the results of the SAP, and in turn withdraw from the SAP. In such instances, if the Program can demonstrate to ACPM that the Applicant is applying to residency/fellowship Programs which will conclude their application and matching processes prior to the SAP initial notification date (e.g. the Program could provide the ACPM with an email or letter from the Applicant documenting that the Applicant has been invited to interview with a Program from another competing, earlier timeframe specialty), then the Program (with the permission of the Applicant) may contact the ACPM (with the Applicant copied) to request permission to communicate to that specific Applicant that the Program will be ranking the Applicant within the Program’s “definite match range” (e.g. within the Program’s top three rank positions, for a Program seeking to fill three slots ... top two rank positions for a Program with two slots, etc.). However, the following conditions/parameters apply:**

1. The Program's slot REMAINS in the SAP;
2. The Applicant cannot be compelled to accept the Program's reserved matching/pairing slot to the exclusion of other PH/GPM Programs, or the other competing residency/fellowship specialties, and the Applicant remains free to accept positions with those Programs instead (this is done as a matter of equity for the Applicant, and so that there is no real or perceived coercion of the Applicant to accept the Program's reserved matching/pairing slot);
3. The Program must provide ACPM with the name and contact information of the Applicant in advance of the competing specialties match date;
4. If the Applicant in question is not already registered with the ACPM-SAP, then the Applicant may register with the ACPM-SAP, and that the Applicant can NOT be required by the Program to commit to the Program prior to the formal SAP notification date.
5. If the Applicant in question is already registered with the SAP, then by requesting this ability, well in advance of the SAP Notification date, for the Program to communicate to the Applicant its intent to rank the Applicant in the Program's "definite match range", then with transparency and equity, both the Program and the Applicant agree that the following information will be shared with all other Programs participating in the SAP:
  - a. Applicant's name and contact information;
  - b. Program's (including name of Program) intent to communicate this "early offer" to the Applicant; and
  - c. The competing medical specialty (residencies or fellowships) that the "early offer" is designed to address, along with the "match date" of the competing (non-PH/GPM) specialty.
6. Unless all of these conditions/parameters can be met at the outset, then Programs/Applicants should NOT request the ability to extend an "early offer".
7. In such instances, it is reasonable (and permissible) for the Program (and the ACPM-SAP) to require the Applicant to inform the Program (and the ACPM-SAP): whether the Applicant has matched into a fellowship from a competing, earlier timeframe specialty; the specific Program; and whether Applicant has elected to (or is required to) accept the position at the alternate program, and by what date. Such notification to the PH/GPM Program (and the ACPM-SAP) should occur within 24 (twenty-four) hours of the Applicant's acceptance of the alternate offer. In the event that the Applicant does not in turn withdraw their application to the Program and to the ACPM-SAP, it is expected that the Program to notify ACPM-SAP to inform the ACPM-SAP participating programs the status of the Applicant, including but not

necessarily limited to the fact that: a) the Applicant has matched with another program; and/or b) the Applicant has accepted a position with another program; and/or c) the Applicant has refused or otherwise failed to inform the Program and the ACPM-SAP of the outcome of their earlier timeframe residency/fellowship matching process.

**Scenario D: There may be instances in which a PH/GPM Program may wish to make an “early” offer to an internal (i.e. within the same hospital or health system) candidate, wishing to make a “lateral” transfer from an internal program that the applicant will not be completing, or a seamless transition from an internal program that the applicant will be completing.** Typically, the candidate/Applicant will have a compelling reason to want to stay at the host institution, the host institution will have a desire to recruit or at least permit the candidate/Applicant to remain at the host institution; and as a matter of “professional courtesy” between departments and/or between the host institution and the candidate/Applicant, the Program has a desire to communicate to the candidate/Applicant that the Program will be ranking the Applicant within the Program’s “definite match range” (e.g. within the Program’s top three rank positions, for a program seeking to fill three slots ... top two rank positions for a program with two slots, etc.). However, the following conditions/parameters apply:

1. The Program’s slot REMAINS in the SAP;
2. The Applicant cannot be compelled to accept the Program’s reserved matching/pairing slot to the exclusion of other PH/GPM programs, or the other competing residency/fellowship specialties, and the Applicant remains free to accept positions with those programs instead (this is done as a matter of equity for the Applicant, and so that there is no real or perceived coercion of the Applicant to accept the Program’s reserved matching/pairing slot);
3. The Program must provide ACPM with the name and contact information of the Applicant;
4. If the Applicant in question is not already registered with the ACPM-SAP, then the Applicant will be provided information (by ACPM) about the ACPM-SAP, and advised (by ACPM) that the Applicant may register with the ACPM-SAP (at no charge to the Applicant), and that the Applicant can NOT be required by the Program to commit to the Program prior to the formal SAP notification date.
5. If the Applicant in question is already registered with the SAP, then by requesting this ability, well in advance of the SAP Notification date, for the Program to communicate to the Applicant the Program’s intent to rank the Applicant in the Program’s “definite match range”, then in the interest of complete transparency and equity, both the Program and the Applicant agree that the following information will be shared with all other Programs participating in the SAP:

- a. Applicant's name and contact information;
  - b. Program's (including name of program) intent to communicate this "early offer" to the Applicant; and
  - c. The Applicant's current relationship with the institution (e.g. "presently a Family Medicine resident at the host institution") but is specifically NOT required to disclose the circumstances under which the Applicant is transferring or transitioning to PH/GPM (e.g. "the Applicant is successfully completing their Chief Resident year in Family Medicine" versus "the Applicant is unsuccessfully concluding their Family Medicine PGY-2 Year, and will be given credit for their PGY-1 Year").
6. Unless all of these conditions/parameters can be met, then Programs/Applicants should NOT request the ability to extend an "early offer".
  7. Note, there are two variations (which are not mutually exclusive) on this scenario, which would modify the approach taken, in that the Program would still notify ACPM with the information noted above, but in which the slot would NOT be required to be filled through the SAP:
    - a. Variation One: The candidate/Applicant is first identified AFTER the SAP has concluded (as noted above) and BEFORE the next SAP application cycle (i.e. opening of ERAS and the SAP website) and the Program is filling a slot that went unfilled in the preceding SAP. [Indeed, this particular Variation One is not limited to intra-institutional candidates/Applicants, but can be utilized by any program filling a previously unfilled slot.]
    - b. Variation Two: The candidate/Applicant is being onboarded "off-cycle", meaning not in the usual June through September timeframe, and is filling a slot that went unfilled in a previous SAP. [Indeed, this particular Variation Two is not limited to intra-institutional candidates/Applicants, but can be utilized by any program filling a previously unfilled slot.]

**Scenario "X":** The scenarios A-D (with examples and variations as noted) listed above represent all of the requests for special considerations and/or exceptions that were raised by program directors in the 2021 meetings of the program directors, and reflect follow-up discussions (via email or real-time telephone conversations) with those program directors. ACPM believes that this Appendix A encompasses all of the identified scenarios, for which ACPM believes it was able to provide a reasonable set of solutions, which are fair to both the individual programs requesting exceptions, as well as the group of all PH/GPM SAP-eligible programs as a whole. Most importantly, ACPM believes that these scenarios protect the interests of applicants, including but not limited to issues of: equity; access; avoidance of coercion; privacy and fairness. That said, this list may not be exhaustive, and there may be scenarios that are as yet unanticipated. To that end, in the future, if a Program believes that

they have a valid need for an exception to these SAP Policies & Procedures, and that the circumstances creating that need are not captured in the scenarios and variations noted above in this Appendix A, then the Program Director should direct their inquiry to the appropriate ACPM staff and leadership, and new scenarios may be considered.



## **Appendix B – ACPM SAP Algorithm and Pairing Process:**

A separate PPT / recording will be available for easier review of the algorithm

1. ACPM staff will prepare a blank “**Master List**” of all participating programs (may be alphabetical) and the number of residency slots that each program has stated they intend to fill in the SAP.
2. For ease of process, ACPM will prepare an alphabetical “**Program List**”, of all participating programs
3. For ease of process, ACPM staff will prepare an alphabetical “**Applicant List**” of all participating applicants.
4. For each participating applicant, ACPM staff will prepare an “**Individual Applicant Rank Order List**”, which will list the programs (most preferred as number 1, second preferred as number 2, etc.) submitted by the individual applicant, in the order submitted by the applicant. [This rank order list will have previously been verified by ACPM via email.]
5. For each participating program, ACPM staff will prepare an “**Specific Program Rank Order List**”, which will list the applicants (most preferred as number 1, second preferred as number 2, etc.) submitted by the specific program, in the order submitted by the program. [This rank order list will have previously been verified by ACPM via email.]
  - 5.1.1. For each Specific Program Rank Order List, there will be an **annotation at the top of the list indicating how many total slots the program intends to fill in the SAP.**
    - 5.1.1.1. For process purposes, there will be a **sub-annotation, listing the number of paired/filled positions, and remaining/vacant positions**, this sub-annotation will change during the course of the SAP.
    - 5.1.2. For each specific program, a demarcation/delineation will be made on the list reflecting the number of residency slots that the program has stated they intend to fill in the SAP. [For example, if a program is filling 3 slots, and has submitted a rank list with 10 applicants’ names, then a demarcating delineation will be made between applicants 3 and 4.]
    - 5.1.3. This demarcation/delineation will be different for every program, depending on the number of slots that program intends to fill.
    - 5.1.4. Applicants listed above a program’s demarcation/delineation line [e.g., the first THREE applicants in the EXAMPLE noted above] are considered

part of that program's "**Automatic Match/Pairing Zone**". [Note: this "demarcation line" may "move down" if/when an applicant above the line is placed into a "FINAL PAIRING" (see below) with another program, and therefore crossed off of the lists of that applicant's remaining programs.]

5.1.4.1. This means that if at any time during the SAP pairing process, one of the applicants is identified as having this program as their first (or top remaining) choice, then that applicant will be assigned to the program as a **FINAL PAIRING**. [When a final pairing is made, the applicant will be removed from subsequent iterations of the SAP, and the program's slot will be removed from further consideration for availability. For process convenience, ACPM staff may then elect to cross off the applicant's name from any of the applicant's lower choice programs, should the applicant appear on those programs' lists.]

6. The **Specific Program Rank Order Lists** are then stacked alphabetically (for ease of process, this does NOT impact the outcome of the SAP).

6.1. For each Program, there should be:

6.1.1. **One copy of the Specific Program Rank Order List** to be used as a "**tracking copy**", which ACPM staff will use to mark-up and track the Program's progress, e.g., identify "Final Pairings" and "Tentative Pairings", as well as to "cross off" ranked Applicants who have been FINAL Paired to another program.

6.1.2. **Additional copie(s) of the Specific Program Rank Order List, equal in number to the number of slot(s) that Program is seeking to fill**, which are to be used as "**physical pairing placeholders**" by ACPM Staff as they TENTATIVELY pair Applicants with Programs and place the pairs into the various "Stacks" referenced below, e.g.: "TENTATIVE Stack" or "FINAL Stack". [Note: Each Applicant can ONLY be paired (either Tentative or Final) with One Program at a time, and each Program can ONLY be paired (either Tentative or Final) with no more Applicants that the number of slots that the Program is seeking to fill.]

7. The **Individual Applicant Rank Order Lists** can then be stacked in any manner (alphabetically or randomly or by **rank order according to apparent Applicant number of rankings** [e.g. number of times that the Applicant appears on Specific Program

**Rank Order Lists, or in Programs' "Automatic Match/Pairing Zones]**, it will NOT impact the outcome of the SAP, although **apparent Applicant number of rankings** is suggested at this stage, for purposes of efficiency noted below). The scoring process for "apparent Applicant number of rankings" is outlined below in Step 9, for reference.

7.1. This is the "**Initial Stack**".

8. Beginning with the first Individual Applicant Rank Order List in the **Initial Stack**, ACPM staff will examine the FIRST CHOICE on that Applicant's list.

8.1. ACPM Staff will then check that program's Specific Program Rank Order List.

8.1.1. If the applicant falls within the Program's "**Automatic Match/Pairing Zone**", then this is a pure first-choice match, and immediately becomes a **FINAL PAIRING**.

8.1.1.1. The applicant's name is circled on the program's Specific Program Rank Order List, and that slot is deemed filled.

8.1.1.1.1. The sub-annotation on the program's Specific Program Rank Order List is modified to reflect one newly filled position, and one less available position.

8.1.1.1.2. The applicant's Individual Rank Order List is then removed from the Initial Stack and placed in the **FINAL Pairing Stack, along with one of the "physical pairing placeholder" copies of the Program's Specific Program Rank Order List**, and no longer needs to be reviewed or considered (except for the final validation stage, discussed below in step/section 11).

8.1.1.1.2.1. The Applicant's name will be "crossed off" (or highlighted) on the alphabetical Applicant List, indicating that the Applicant has been placed into a Final Pairing.

8.1.2. If the Applicant does NOT fall within the Program's "Automatic Match/Pairing Zone", but DOES appear on the Program's Specific Program Rank Order List, then the Applicant's Individual Applicant Rank Order List is placed in the **Tentative Pairing Stack, along with one of the "physical pairing placeholder" copies of the Program's Specific Program Rank Order List**. [Note: Each applicant can ONLY be paired (either Tentative or Final) with One Program at a time, and each Program

can only be paired (either Tentative or Final) with no more Applicants than the number of slots that the program is seeking to fill.]

- 8.1.3. If the Applicant does NOT fall within the Program's "Automatic Match/Pairing Zone", and does NOT appear on the Program's Specific Program Rank Order List, then the Program is crossed off the applicant's Individual Applicant Rank Order List, and ACPM staff will proceed down to the NEXT Program on the SAME Applicant's Individual Rank Order List and repeat steps 8 through 8.1.2. above until all Programs on the Applicant's Individual Applicant Rank Order List have been so processed.
  - 8.1.3.1. Note: At this stage, applicants with the "apparently the greatest number of rankings" are expected to be placed into the **Final Pairing Stack** or the **Tentative Pairing Stack**, but this may or may not be the case, depending on the Programs that the Applicant has listed on their Individual Applicant Rank Order List.
  - 8.1.3.2. If NO programs on the Applicant's Individual Applicant Rank Order List have listed the Applicant on their Specific Program Rank Order Lists, then each of the Programs listed on the Applicant's Individual Applicant Rank Order List should be crossed off that list, and the Applicant can be placed in the **Unpaired Stack**.
  - 8.1.3.3. If there is at least one Program on the Applicant's Individual Applicant Rank Order List that has also named the Applicant on its Specific Program Rank Order List, but the Applicant's name is farther down the Program's Specific Program Rank Order List than other TENTATIVELY Paired Applicants [note: this does NOT apply to FINAL pairings], then the Applicant is placed in the **Pending Stack**. This Applicant is held in the Pending Stack in case there are movements or changes to the pairings in the Tentative Pairing Stack (other than converting them to Final Pairings) that might move the Applicant into a paired (either Tentative or Final) situation.
- 8.1.4. If there is at least one Program on the Applicant's Individual Applicant Rank Order List that has also named the Applicant on its Specific Program Rank Order List, but the Applicant's name is farther down the Program's Specific Program Rank Order List than other

TENTATIVELY Paired Applicants, and the Program in question is at its maximum number of available slots filled by Tentative pairings or some combination of Tentative and Final Pairings [note: this does NOT apply to the scenario where the Program's slots are filled by all FINAL pairings], then the Applicant is placed in the **Pending Stack**, and ACPM staff will proceed down to the next Program on the Applicant's Individual Rank Order List, and repeat the above process to see if there is a pairing. If the Applicant's list is run, and there are no Final or Tentative pairings, then this Applicant is held in the Pending Stack in case there are movements or changes to the pairings in the Tentative Pairing Stack (other than converting them to Final Pairings) that might move the Applicant into a paired (either Tentative or Final) situation. [Note: Each Applicant can ONLY be paired (either Tentative or Final) with One Program at a time, and each Program can ONLY be paired (either Tentative or Final) with no more Applicants than the number of slots that the Program is seeking to fill.]

8.2. ACPM staff will then REPEAT this process for all of the Applicants' Individual Rank Order Lists in the Initial Stack. [It is estimated that 30-50% of all Applicants will be placed into Final Pairings, and therefore the **FINAL Pairing Stack**, as a result of this step in the process. The remaining Applicants will be in either the **Tentative Pairing Stack** or the **Pending Stack**.]

8.2.1. After performing this process on ALL of the Applicants in the **Initial Stack**, there will be no remaining applicants in the Initial stack, and all will be in either the Final Pairing Stack, the **Tentative Pairing Stack**, or the **Pending Stack**.

8.2.2. Note: If at any time, an Applicant is placed into a Final or Tentative Pairing with a Program, and that pairing DISPLACES a LOWER Ranked Applicant on that Program's Specific Program Rank Order List, who had previously been placed into a Tentative Pairing with that Program, then the DISPLACED Applicant is immediately processed (again) next, moving down to the next Program on the DISPLACED Applicant's Individual Applicant Rank Order List, and following steps 8 through 8.1.1.3 as noted above. [Note: Each Applicant can ONLY be paired (either Tentative or Final) with One Program at a time, and each Program can ONLY be

paired (either Tentative or Final) with no more Applicants than the number of slots that the Program is seeking to fill.]

- 8.2.3. **ACPM STAFF AD/OR SAP PAIRING TEAM WILL HOLD A PAUSE IN THE PROCESS PERIODICALLY, TO ENSURE THAT ALL MEMBERS OF THE TEAM WHO ARE PERFORMING THE SAP PROCESS CONCURRENTLY (BUT INDEPENDENTLY OF EACH OTHER) HAVE IDENTICAL PAIRINGS AND PLACEMENTS IN THEIR RESPECTIVE LISTS: FINAL PAIRING STACK; TENTATIVE PAIRING STACK; PENDING STACK and UNPAIRED STACK. ANY DISCREPANCY MUST BE FULLY INVESTIGATED AND RESOLVED BEFORE PROCEEDING.**

9. Applicant “scoring”:

- 9.1. Note, this step does NOT impact the final pairings or outcomes of the SAP, it is performed simply to make subsequent iterations of the pairing process more efficient, by allowing for the processing of the most frequently ranked applicants first, thereby more efficiently identifying any remaining pairings of applicants in Programs’ Automatic Match/Pairing Zones, thereby identifying Final Pairings, filling those slots, and eliminating those applicants from further iterations of the SAP process. It also allows for a presumably more efficient assignment to the Tentative Pairing Stack, with Applicants with “more rankings” assigned first.
- 9.2. ACPM Staff will go through every Specific Program Rank Order List, and review the slots available in that program’s **Automatic Match/Pairing Zone** and if deemed useful by ACPM staff, the remaining **Specific Program Rank Order List**, every time an Applicant is listed in a Program’s Automatic Match/Pairing Zone, that Applicant will be given a “**two points**”, every time an Applicant is listed in a Program’s remaining **Specific Program Rank Order List**, that Applicant will be given a “**one point**”, which will be tallied on the Applicant’s **Individual Applicant Rank Order List** (from the **Pending Stack**).
- 9.2.1. every time an Applicant is listed in a Program’s Automatic Match/Pairing Zone, that Applicant will be given a “**two points**”,
- 9.2.2. every time an Applicant is listed in a Program’s remaining **Specific Program Rank Order List**, that Applicant will be given a “**one point**”,
- 9.2.3. these will be tallied on the Applicant’s **Individual Applicant Rank Order List** (from the **Pending Stack**).

9.2.4. This is done for EVERY program, and every Applicant in those program's Automatic Match/Pairing Zone and if deemed useful by ACPM staff, the remaining Specific Program Rank Order List.

9.2.4.1. Note: This is why it will likely make most sense to initially stack the applicants alphabetically or by rank order according to the Applicants' number of rankings (instead of randomly) in the Initial Stack, and in turn in the Pending Stack, as this will ease the process flow, without affecting the outcome.

9.2.4.2. Note: Applicants in the FINAL Pairing Stack need not be scored, as they have already been paired.

9.2.4.3. Note: During this process, ACPM Staff may elect to "cross off" any Applicants in the Specific Program's Rank Order Lists that they KNOW to have already been paired/matched into a FINAL Pair in the Final Pairing Stack with another Program, as this will make subsequent iterations through the SAP process more efficient.

9.2.4.4. Note: During this process, if ACPM staff has scored the Applicants using BOTH the **Automatic Match/Pairing Zone** AND the remaining **Specific Program Rank Order List** for ALL Programs and All Applicants, and if any Applicants are assigned ZERO (0) points (i.e. the Applicant does NOT appear on ANY Programs' Specific Program Rank Order List), then any such Applicants with scores of ZERO (0) can be removed from the **Initial or Pending Stack** and placed in the **UNPAIRED Stack**, as they will not be paired with any Programs.

**9.2.4.4.1. Note: IF "Frequency-of-Ranking-Based" SCORING IS DONE AT THE OUTSET BASED ON HOW FREQUENTLY AN APPLICANT IS RANKED BY PROGRAMS (AS IS RECOMMENDED FOR PROCESS SIMPLICITY), THEN THE FIRST PAUSE IN THE PROCESS WILL BE FOR ACPM STAFF AND MEMBERS OF THE SAP PAIRING TEAM (WHO ARE PERFORMING THE SAP PROCESS CONCURRENTLY (BUT INDEPENDENTLY OF EACH OTHER) TO CHECK**

**THESE EARLY PLACEMENTS INTO THE UNPAIRED STACK, ANY DISCREPANCIES IN THESE EARLY PLACEMENTS INTO THE UNPAIRED STACK MUST BE INVESTIGATED AND RESOLVED BEFORE PROCEEDING.**

- 9.3. ACPM Staff will then stack both the **Tentative Stack and the Pending Stack** by order of the score achieved in the scoring process, with the highest score first (i.e., on top), and the lowest score on the bottom of each stack.
- 9.3.1. Again, this stacking from highest to lowest score does NOT affect the final outcome of the SAP, it merely provides for greater efficiency.
10. Starting with the first (“highest scoring”) applicant in **Tentative Stack**, ACPM staff will look at the highest ranked program on the Applicant’s **Individual Applicant Rank Order List and** verify that it is the Program to which the Applicant is Tentatively Paired.
- 10.1. ACPM Staff will then check that program’s **Specific Program Rank Order List**.
- 10.1.1. If the Applicant falls within the Program’s “**Automatic Match/Pairing Zone**”, **OR if there are NO OTHER APPLICANTS RANKED HIGHER THAN THIS APPLICANT** on this Program’s rank order list, then this immediately becomes a **FINAL PAIRING**.
- 10.1.1.1. The Applicant’s name is circled on the Program’s Specific Program Rank Order List, and that slot is deemed filled.
- 10.1.1.1.1.** The sub-annotation on the program’s Specific Program Rank Order List is modified to reflect one newly filled position, and one less available position.
- 10.1.1.1.2.** The Applicant’s Individual Rank Order List is then removed from the **Tentative Stack** and placed in the **FINAL Pairing Stack, along with one of the “physical pairing placeholder” copies of the Program’s Specific Program Rank Order List**, and no longer needs to be reviewed or considered, (except for the final validation stage, discussed below in step/section 11).
- 10.1.1.1.2.1. The applicant’s name will be “crossed off” (or highlighted) on the alphabetical Applicant List,



indicating that the applicant is been placed into a Final Pairing.

10.1.2. If the Applicant does NOT fall within the Program’s “Automatic Match/Pairing Zone”, but DOES appear on the Program’s Specific Program Rank Order List, BUT there are other Applicant’s whose names appear higher on the Program’s rank order list than the Applicant being processed, then the higher-ranking Applicant’s on the Program’s rank order list must be checked:

10.1.2.1. If the higher-ranking Applicant is already in the Final **Pairing Stack with a DIFFERENT Program, that the higher-ranking Applicant ranked higher than the Program in question, then the higher-ranking Applicant may be crossed off the Program in question’s Program Specific Rank Order List, if it has not already been crossed off.**, if it has not already been crossed off.

10.1.2.2. If the higher-ranking Applicant is in the **Tentative Pairing Stack with a DIFFERENT Program that the higher-ranking Applicant ranked higher than the Program in question**, and is therefore already paired with a Program that the higher-ranking Applicant has ranked higher than the Program in question, then both Applicants and Programs remain with their Tentative Stack pairings, and the rank list of the Program in question is annotated that the higher-ranked Applicant is already paired in the **Tentative Pairing Stack** with another/preferred Program, and no change is made to the stacks.

10.1.2.3. If the higher-ranking Applicant is in the **Tentative Pairing Stack**, and was inadvertently paired with a Program that is lower on the higher-ranking Applicant’s rank order list, then this error would be corrected, and the higher-ranking Applicant would be tentatively paired with the Program in question (and placed back into the Tentative Pairing Stack), potentially displacing the Applicant in question, and opening a slot in the Program in question. Note: It is not expected that this will happen, if care is taken when processing each applicant in the Initial Stack into their highest

mutually ranked program (if any), but this serves as a check on that process.

- 10.1.2.4. If the higher-ranking Applicant is in the **Unpaired Stack** and was inadvertently not paired with the Program in question, then this error would be corrected, and the higher-ranking Applicant would be tentatively paired with the Program in question (and placed into the **Tentative Pairing Stack**), potentially displacing the Applicant in question. Note: It is not expected that this will happen, if care is taken when processing each applicant in the Initial Stack into their highest mutually ranked program (if any), but this serves as a check on that process.
  - 10.1.2.4.1. If at any time during this review of the Tentative Pairing Stack pairings the Applicant in question, falls into the Program in question's Automatic Pairing Zone (e.g. by identifying that other higher-ranked Applicants have already been placed into Final Pairings), then the Tentative pairing being reviewed can be made a Final pairing then removed from the **Tentative Stack** and placed in the **FINAL Pairing Stack, along with one of the "physical pairing placeholder" copies of the Program's Specific Program Rank Order List**, and no longer needs to be reviewed or considered, (except for the final validation stage, discussed below in step/section 11).
  - 10.1.2.4.2. If an Applicant creates only one TENTATIVE Pairing for the Program, then the process remains the same, as delineated above.
  - 10.1.2.4.3. However, if this Applicant creates MULTIPLE Tentative Pairings for the Program, then:
    - 10.1.2.4.3.1. If the Program still has enough vacant slots, then all tentative pairings may still be left with that program (as they represent the Applicants' top choices) until such time that the number of tentative pairings for a Program exceeds the Program's available slots (**a Program can NOT have more tentative pairings than its available slots**), in which case ...
      - 10.1.2.4.3.1.1. The LOWEST of the multiple tentative pairings for that Program is placed back to

the TOP of the Pending Stack (because it is now apparent that that Applicant will NOT be paired with that Program) and processed NEXT from the Pending Stack (because that Applicant is presumptively the highest scored, or one of the highest scored remaining Applicants, compared to those still in the **Pending Stack**).

10.1.2.5. Upon completion of review of all of the pairings in the **Tentative Pairing Stack**, then the Applicants in the **Pending Stack** (if any) are reviewed, following the same steps as outlined above in this Section 10 for Applicants who were in the **Tentative Pairing Stack**. The **Pending Stack** is reviewed, in order of scoring, similar to above.

**10.1.2.5.1.** As each Applicant in the **Pending Stack** is reviewed, if there are no remaining pairings (e.g., Final or Tentative) for that Applicant, then that Applicant can be moved to the **UNPAIRED Stack**.

**10.1.2.5.2. ACPM STAFF AND/OR THE SAP PAIRING TEAM WILL HOLD A PAUSE IN THE PROCESS PERIODICALLY, TO ENSURE THAT ALL MEMBERS OF THE TEAM WHO ARE PERFORMING THE SAP PROCESS CONCURRENTLY (BUT INDEPENDENTLY OF EACH OTHER) HAVE IDENTICAL PAIRINGS AND PLACEMENTS IN THEIR RESPECTIVE LISTS: FINAL PAIRING STACK; TENTATIVE PAIRING STACK; PENDING STACK (there should be none in the PENDING STACK at this juncture) and UNPAIRED STACK. ANY DISCREPANCY MUST BE FULLY INVESTIGATED AND RESOLVED BEFORE PROCEEDING.**

10.1.2.6. Upon completion of review of all of the pairings in the **Tentative Pairing Stack**, and the **Pending Stack**, then the **UNPAIRED Stack** is reviewed, in order of scoring (only the Applicants with non-zero scores need be reviewed, because all Applicants with “zero” scores were verified as being unpaired after the initial scoring and placement into the Unpaired Stack, but **ACPM staff**

**and the SAP Pairing Team may elect to double-check their lists of Applicants with “zero” scores at this juncture).**

10.1.2.7. The **Unpaired Stack** (if any) are reviewed, following the same steps as outlined above in this Section 10 for Applicants who were in the **Tentative Pairing Stack** and **Pending Stack**. The

**Unpaired Stack** is reviewed, in order of scoring, similar to above.

10.1.3. When the **Unpaired Stack** has been fully reviewed without causing any changes to any other stacks, then **THE ACPM STAFF AND/OR THE SAP PAIRING TEAM WILL HOLD A PAUSE IN THE PROCESS PERIODICALLY, TO ENSURE THAT ALL MEMBERS OF THE TEAM WHO ARE PERFORMING THE SAP PROCESS CONCURRENTLY (BUT INDEPENDENTLY OF EACH OTHER) HAVE IDENTICAL PAIRINGS AND PLACEMENTS IN THEIR RESPECTIVE LISTS: FINAL PAIRING STACK; TENTATIVE PAIRING STACK; PENDING STACK (there should be none in the PENDING STACK at this juncture); and Unpaired Stack. ANY DISCREPANCY MUST BE FULLY INVESTIGATED AND RESOLVED BEFORE PROCEEDING.**

10.1.4. At this juncture, when the **Unpaired Stack** has been fully reviewed without causing any other changes to any other stacks, then the pairings in the **Tentative PAIRING Stack** can be made final pairings and be moved to the **Final Pairing Stack**, along with one of the “physical pairing placeholder” copies of the Program’s Specific Program Rank Order List, and no longer needs to be reviewed or considered, (except for the final validation stage, discussed below in step/section 11). Any Applicants remaining in the **Pending Stack** (there should be none) can now be presumptively moved to the **Unpaired Stack**. [Note: Each Applicant can ONLY be paired (either Tentative or Final) with One Program at a time, and each Program can ONLY be paired (either Tentative or Final) with no more Applicants than the number of slots than the Program is seeking to fill.]

11. When the entire **Unpaired Stack** is run through without change, and without change to the other stacks, then it appears that there are no more pairings/matches to be made, and the stacks must be reviewed or reconciled.

- 11.1.1. The pairings in the **FINAL Pairing Stack** must be reviewed to verify that each pairing represents the highest available Program choice for the Applicant, and the corresponding highest available Applicant choice(s) for the Program. For each Applicant in the Final Pairing Stack, there should be no Program on their Individual Applicant Rank Order List that the Applicant has ranked higher than the Program to which they have been presumptively paired/matched, that has either an unfilled slot, or has the Applicant listed on their Specific Program Rank Order List ranked higher than those Applicants that have been presumptively paired/matched with that Program. For each Program in the Final Pairing Stack, there should be no Applicant in their Specific Program Rank Order List, ranked higher than the Applicant(s) that have been presumptively matched with the Program, that is still **Pending** or **Unpaired/Unmatched**, or that has the Program listed on their Individual Applicant Rank Order List, ranked higher than the Program to which the Applicant has been presumptively matched.
- 11.1.2. There should be no more Applicants/pairings in the **TENTATIVE Pairing Stack**, as they were moved to the **Final Pairing Stack** above.
- 11.1.3. There should be no more Applicants in the **Pending Stack**, because they were moved to the **Unpaired Stack** above.
- 11.1.4. No Applicants in the **Unpaired Stack** should appear on any Programs rank order lists (above Final Paired Applicants) in the **Final Pairing Stack**.
- 11.1.5. At NO TIME, should an Applicant be paired with a Program that the Applicant did not rank on the Applicant's Individual Applicant Rank Order List.
- 11.1.6. At NO TIME, should an Applicant be paired with a Program if the Applicant does not appear on the Program's Specific Program Rank Order List.
- 11.1.7. Each Program can ONLY be paired with One Program at a time.
- 11.1.8. Each Program can ONLY be paired with no more Applicants than the number of slots that the Program is seeking to fill.
- 11.2. After all **Stack** reviews (and placement into either the **FINAL Stack** or **UNPAIRED Stack**) are completed, there should be NO Applicants/Programs left

in the **Tentative Stack** or **Pending Stack**, and ALL Applicants should be in EITHER the **FINAL Pairing Stack** or the **UNPAIRED Stack**.

- 11.3. **ACPM STAFF AND/OR THE SAP PAIRING TEAM WILL HOLD A PAUSE IN THE PROCESS PERIODICALLY, TO ENSURE THAT ALL MEMBERS OF THE TEAM WHO ARE PERFORMING THE SAP PROCESS CONCURRENTLY (BUT INDEPENDENTLY OF EACH OTHER) HAVE IDENTICAL PAIRINGS AND PLACEMENTS IN THEIR RESPECTIVE LISTS: FINAL PAIRING STACK; TENTATIVE PAIRING STACK; PENDING STACK (there should be none in the PENDING STACK at this juncture); and Unpaired Stack. ANY DISCREPANCY MUST BE FULLY INVESTIGATED AND RESOLVED BEFORE PROCEEDING.**
  - 11.4. **The results of the manual processing of the SAP algorithm may be compared against the results of a computer program designed to run using the same pairing logic as outlined above. If done, then any discrepancies will be addressed.**
12. The results of this process (i.e. the **FINAL PAIRING STACK** and the **UNPAIRED Stack**) as well as any audit-friendly documentation (lists or worksheets) that were generated and maintained during the SAP should be internally audited by additional ACPM Staff, and/or designated ACPM physician leadership, as designated by the SAP policies and procedures, PRIOR to the results (i.e. communications derived from the **FINAL Stack**, **UNPAIRED Stack**, or maintained on the **Master List** during this algorithm) of this algorithm/process being released, as a check on quality/accuracy.