

<b>TRAINING PROGRAM POLICY</b> for Michigan Medicine/VA Ann Arbor Healthcare System Network of Postdoctoral Programs in Psychology		
<b>Psychology Postdoctoral Fellow Academic File and Retention Policy</b>		
Date Initiated: 08/03/2018	Last Revised: 10/02/2019	PTC Approval: 10/02/2019

**PURPOSE**

The fellowship training program must maintain fellow academic files for the purpose of documenting education, training, and competence. The academic files are available to the fellow and specified individuals as described below. Following completion of training, information in the fellow file will be maintained by the Department for internal documentation and for documenting the training for outside agencies. This policy applies to paper and electronic academic files.

**STANDARDS**

1. The fellowship training program will maintain an academic file for each fellow during the duration of their training program. This file must subsequently be maintained after the fellow has left the training program.
2. The academic file will be regarded as confidential, will be maintained in a secure location and will be available only to the Program Director, the training program’s clinical supervisors, designated administrative staff of the fellowship program, and other University officials or members of the American Psychological Association Commission on Accreditation with a legitimate need to review the academic files.
3. Upon request, the fellow shall have access to his or her academic file under direct supervision of a designated staff member in the fellowship office. Upon written request, copies of summative evaluations will be provided to the requesting fellow.
4. The Program Director may disclose the academic file, or portions thereof, to others based upon a legitimate need for the information (e.g., for matters relating to the education of the fellow, the quality of education in the training program, or the quality of patient care in the training program). The Chief of Staff or an associate of the Office of Clinical Affairs, the Associate or Assistant Dean for Graduate Medical Education, or the Graduate Psychology Education Committee (GPEC) Chair maintains the right to request all of or portions of the academic file of any fellow. The Program Director may also disclose the academic file, or portions thereof, to others, if authorized in writing by the fellow.
5. The GPEC may conduct audits of fellow academic files at any time, in order to ensure compliance with institutional policies and procedures.

**Contents of the Academic File**

The academic file will contain copies of each of the following:

- Original application to the training program and all submitted supporting documentation
- Credentialing documentation:
  - Offer letter sent by the training program
- Written evaluations from the faculty and others

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- The periodic summative evaluations by the Program Director
- Most current Michigan psychology license while in the program
- A copy of any certificate of completion
- Disciplinary action documentation (*if applicable*)
- Visa and immigration status documentation (*if applicable*)
- Other information concerning the fellow that the Program Director judges appropriate to maintain in the academic file for purposes of evaluation, training, and documentation.

Fellows who disagree with the information contained in the academic file may submit a written statement to the Program Director, Chair and GPEC outlining the reasons for the disagreement. This statement shall be maintained in the academic file.

For the training program, academic files may be maintained in paper or electronic format. Once paper files are scanned and appropriately maintained, the paper copy destroyed.

- Electronic storage must be on a University of Michigan server.
- Electronic storage must be on a Michigan Medicine shared drive and not a personal computer, personal storage drive, or any type of external hard drive.
- The individual overseeing the academic file conversion from paper to electronic is responsible to ensure all documents have been successfully scanned.

The paper academic file must be shredded through a confidential service (UM or VA blue bins are acceptable).