

Surgery

McMaster
University 

2017-2018 Merit Instruction Manual

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2018 Education/Research Merit Summary

The following pages provide a summary of what activities count toward Merit Points and the point value assigned for each activity.

Please note that the majority of teaching activity is entered for you by the Program Coordinators of Surgery, Undergraduate Medicine, Postgraduate Medicine, Graduate Offices of Health Research Methodology and Medical Sciences and the Bachelor of Health Science Programs. However, there are specific items that the Surgeon or delegate must enter, and these are marked in the sections contained within the pages ahead.

Useful information such as guidelines on STAR Merit Entry either through MacFacts or through STAR itself can be found here: macfacts.mcmaster.ca.

Please note the following issues, which frequently arise when entering data, and ensure that they are addressed so that all activity will be captured for Merit:

- When entering Presentations (Research) the field “Presenter Role” must be completed in STAR (not MacFACTS).
- When entering Grants, the field “Your Involvement” must be completed to be captured for Merit and can only be entered in STAR.
- If entering activity under Contributions to Teaching Practice, Course/CurriculumDevelopment, please provide details to Leigh Mahan (lemahan@mcmaster.ca). These activities are not automatically picked up for Merit and points are awarded manually.
- If you have any Royal College activity, including CBD workshops, please enter and advise Leigh Mahan (lemahan@mcmaster.ca) as points must be awarded manually for almost all Royal College activity.
- If you have teaching on an Academic Half Day outside of Surgery (e.g. Pediatrics, Internal Medicine) this will be entered, but you will need to advise Leigh Mahan (lemahan@mcmaster.ca) as points must be awarded manually.
- When publishing an article, your academic affiliation should be stated as McMaster University (not HHS or SJHH), so that it can be captured during regular PubMed searches.
- If you are part of a writing group/group authorship for an article, please let Leigh Mahan know the publication details, since all authors may not be listed on PubMed.
- Dates should be entered as completely as possible (at least year and month); do not use entries such as “2012 - present” for activities as they may not be captured correctly.
- Only the roles listed in the summary in the “Path” column are captured for Merit; if the role is not listed there, do not select it from the drop-down list when entering data. (Examples: Judge, Research Day; Instructor, Clinical Skills)

If you have any specific questions on how/where to enter activity that is not covered in the pages ahead, please contact Cathy Turner or Leigh Mahan.

A photograph of three healthcare professionals, two men and one woman, wearing blue scrubs and surgical caps. They are gathered around a clipboard, looking at a document. The woman on the left is pointing at the document. The man in the center is holding the clipboard. The man on the right is holding a piece of paper. The background is a blurred clinical setting.

Education Activity

Undergraduate Medical Teaching Activity

Please note that if you are Program Director or CTU Director (UG), a stipend is paid and therefore you are ineligible for much of UG merit. The Program Coordinator will enter the actual Director role for you. It is, however, important that these roles be included in your STAR-CV, if applicable, for creating a McMaster format CV and other reports.

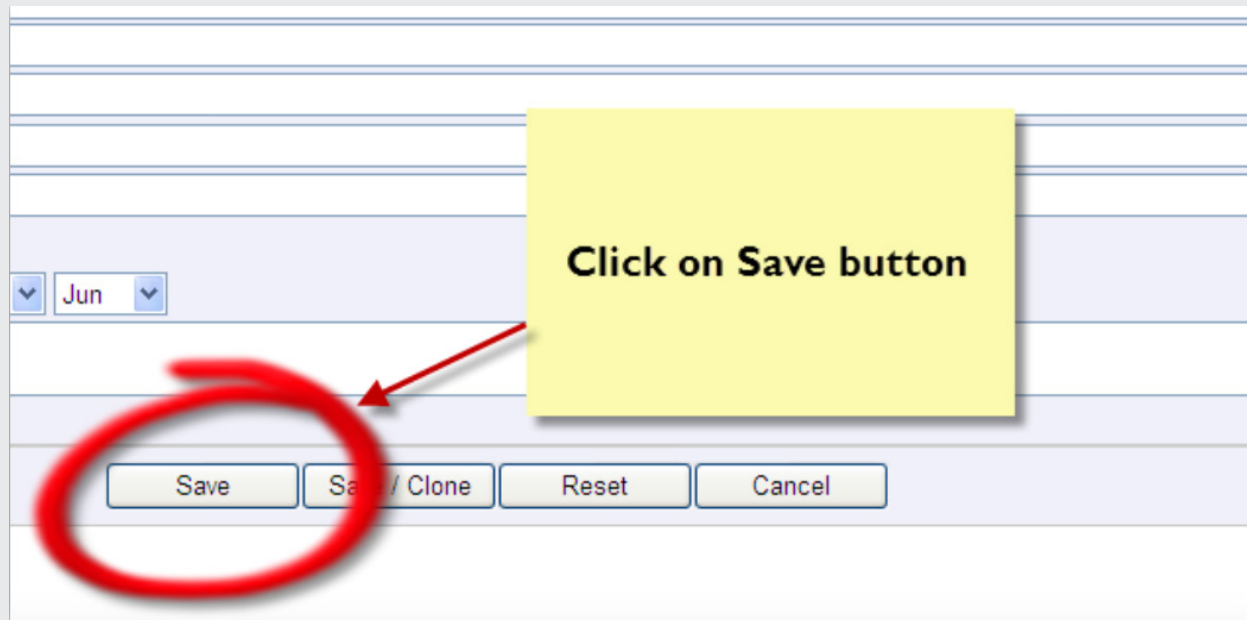
Activity	Who enters/who to call	Value	Path	Instruction/Note
Clerkship Supervision: based on two-week rotation – Undergraduate Medicine Clerkship or Physician Asst. Education	UG Clerkship Coordinator	5 pts/wk	UMC or PA, Surgery – General, Supervisor, Selective, Clerkship (2 wks)	
Clerkship Supervision: based on four-week rotation - Undergraduate Medicine Clerkship or Physician Asst. Education	UG Clerkship Coordinator	5 pts/wk	UMC or PA, Surgery – General, Supervisor, General, Clerkship (4 wks)	
Large Group Session	UG Clerkship Coordinator	4/session	UM or UMC, Surgery, Presenter, Teaching Session	Program Secretary Description must include "Large Group Session"
Large Group Session – Orthopaedics	UG Clerkship Coordinator	4/session	UMC, Orthopaedics, Clerkship, Presenter, Teaching Session	Program Secretary Description must include "Large Group Session"
Oral Examiner – Clerks (incl. Phys. Asst. program exams; please advise if you have this activity as points must be awarded manually)	UG Clerkship Coordinator	1.5/clerk	UMC, Clerkship, Presenter, Teaching Session, Contact Hours, Occasion	Program Secretary Description must include "Clerkship Oral Exam"
Professional Competency – these are entered as Large Group Sessions and Round Table Discussions	UG Clerkship Coordinator	4 each	UM or UMC, Surgery, Clerkship, Presenter, Teaching session, Contact Hours, Occasion	Program Secretary Description to include "Large Group Session" AND "Professional Competency" or "Professional Competencies"
Round Table Discussions (Formerly "Small Group Sessions")	UG Clerkship Coordinator	4 each	UMC, Surgery, Presenter, Teaching Session	Program Secretary Description must include "Large Group Session: Round Table Discussion"
Clerkship Supervision: based on two-week rotation (orthopaedics)	UG Ortho Clerkship Coordinator	5 pts/wk	UMC, Orthopaedics, Supervisor, Clerkship, Contact Hours, 2 weeks	

Activity	Who enters/who to call	Value	Path	Instruction/Note
Assessor, CASPer, Admissions	UG Medical Office	15/session	Assessor, CASPer, Admissions	
Electives, Block or Visiting: Supervisor, Student Elective Block (pre-clerkship) / Visiting Student Electives	UG Medical Office	10/week	UM, Block or Visiting, Supervisor, Electives, Contact Hours, Week	If no evaluation form is submitted, electives form must be completed and forwarded to UM office
Electives, Horizontal: Supervisor, Student Electives-Horizontal (pre-clerkship)	UG Medical Office	2/week	UM, Horizontal, Supervisor, Electives, Contact Hours, Week	
Interviewer Admissions MMI	UG Medical Office	30 pts/wkend	UM, MMI, Interviewer, Admissions, Contact Hours, Weekend	
LMCC Review Lectures	UG Medical Office	4/lecture	UM, Review Lectures, Speaker, Large Group session, Contact hours, Occasion	Program Secretary Description must include "LMCC Review Lectures"
MF1, Tutor	UG Medical Office	400	UM, MF1, Tutor, Contact Hours, Unit	
MF1, Co-tutor	UG Medical Office	200	UM, MF1, Co-tutor/tutor in Training, Contact Hours, Unit	
MF1, Preceptor, Clinical Skills	UG Medical Office	200	UM, MF1, Preceptor, Clinical Skills, Contact Hours, Rotation	
MF2, Tutor	UG Medical Office	200	UM, MF2, Tutor, Contact Hours, Unit	
MF2, Co-tutor	UG Medical Office	100	UM, MF2, Co-tutor/tutor in Training, Contact hours, Unit	
MF2, Preceptor, Clinical Skills	UG Medical Office	100	UM, MF2, Preceptor, Clinical Skills, Contact Hours, Rotation	
MF3-5, Tutor	UG Medical Office	220	UM, MF3, MF4, or MF5, Tutor, Contact Hours, Unit	
MF3-4, Co-tutor	UG Medical Office	110	UM, MF3 or MF4, Co-tutor/tutor in Training, Contact Hours, Unit	
MF3-5, Preceptor, Clinical Skills	UG Medical Office	110	UM, MF3, MF4, or MF5, Preceptor, Clinical Skills, Contact Hours, Rotation	
MF5, Coordinator, Clinical Skills	UG Medical Office	100	UM, MF5, Coordinator, Professional Skills, Total hours, Year	

Activity	Who enters/who to call	Value	Path	Instruction/Note
MF 1-5, Planner	UG Medical Office	100	UM, Planner, Mf 1, 2, 3, 4 or 5, Total Hours, Year	
OSCE Examiner, MD Program	UG Medical Office	20/evening	UM, Examiner, OSCE, Contact Hours, Occasion	
Preceptor, Ophthalmology Session	UG Medical Office	3/session	UM, Coordinator, Ophthalmology Clinical Teaching, Contact Hours	
Presenter, Clerkship Orientation Day incl. Cardiac Rotations	UG Medical Office	8/student	UM, Preceptor, Clerkship Orientation, Contact Hours, Occasion	

Activity	Who enters/who to call	Value	Path	Instruction/Note
Advisor, Student: must be committed to supervising six students per year	Medical Secretary	16.6 per student	UM, Advisor, Student (Super), Contact Hours, Group of 6	

TIP!



Ensure that you always hit "Save" before moving onto another entry or leaving MacFACTS altogether!

Postgraduate Medical Teaching Activity (Resident Teaching)

Please note that if you are Program Director, Director of a Specialty Program (five-year) or Subspecialty Program (two-year), a stipend is paid and therefore you are ineligible for much of merit. These roles are entered by the Program Coordinator, who will also enter CTU Director role on your behalf.

The following teaching activity does not count for Merit but needs to be entered for tracking purposes: Supervisor - Clinical Inpatient, Supervisor - Clinical Out-patient/Ambulatory Care, Supervisor - On Call, Supervisor - OR. Please send details to the Program Coordinator for entry.

The following teaching activity does not count for Merit but needs to be entered by the individual surgeon or delegate. These roles include: Supervisor - PhD/PostDoc, Other Settings, not lab-based, Supervisor - Research, PhD/PostDoc, lab-based.

It is, however, important that these roles be included in your STAR-CV if applicable, for creating a McMaster format CV and other reports.

When entering data, please refer to the "Path" column to select the correct Role from the drop down list. Only these Roles are captured for Merit.



Activity	Who enters/who to call	Value	Path	Instruction/Note
Advisor, Research - Resident/ Med Student Research Project. One submission if Med Student and Resident working on same project; project must be presented or planned to be presented at Research Day or external meeting. Advise if entries are made in this category so points can be awarded.	Program Coordinator	25/project Points to be assigned manually at time of approval	Ssub, Advisor/Mentor, Resident, Resident Per Year	Description must include: project name, resident name, start and end dates. One entry if Med Student and Resident are working on the same project.
Coordinator (Admin), Academic Half Days	Program Coordinator	10/Half-Day	Ssub, Coordinator, Academic Half-Day/Core Curriculum, Year	
Director, Fellowship, Mentorship, Research	Program Coordinator	30	UM, Block or Visiting, Supervisor, Electives, Contact Hours, Week	There is no specific selection for Mentorship role; use either of other roles.

Activity	Who enters/who to call	Value	Path	Instruction/Note
Director, CTU	Program Coordinator	Dependant on the number of trainees	Ssub, Director, Clinical Teaching Unit/Site, year Number of trainees 0 to 10, 11 to 20, 21 to 30, 31 to 40, 41 to 50, 51 and over	Must enter appropriate number under "Number of Trainees"
Evaluator, Academic Half Day (incl. Judge, Research Day)	Program Coordinator	2	Ssub, Presenter, Academic Half-Day	Program Secretary description must include "evaluator"
Evaluator, Teaching Skills incl. Clinical Educator Program	Program Coordinator	2	Ssub, Presenter, Academic Half-Day	Program Secretary description must include "evaluator"
Examiner, Mock Orals/Oral or Written Exams – Resident	Program Coordinator	3/session	Ssub, Examiner, Long Case/ Oral/STACER	Program Secretary description does not include words "marking" or "evaluation"
Examiner, OSCE – Resident	Program Coordinator	Time-based: 3/half-day 6/full-day	Ssub, Examiner, Observed Structured Clinical Examination (OSCE), Occasion	
Reader, Admissions, CaRMS or Equivalent	Program Coordinator	0.5/application	Ssub, Reviewer, Admissions, Candidate	Must enter number of files reviewed under "Number of Times"
Interviewer, Admissions – Residency/Fellowship Program (Cannot be claimed if faculty member is Program Director)	Program Coordinator	1/candidate	Ssub, Interviewer, Admissions, Candidate	Must enter number of interviews under "Number of Trainees"
Journal Club – Chair, Journal Club per residency program per year	Program Coordinator	20/year	Ssub, Coordinator, Journal Club, Per Year	Enter 1 only in Number of Times
Journal Club – Faculty Discussant, Resource person, Organizer, or Attendee per session	Program Coordinator	2/session	Ssub, Presenter, Journal Club, Presentation	Enter details, i.e. Date(s) in Program Secretary Description
Member, Residency Education/ Training Committee or Academic Lead, CBD	Program Coordinator	12	Ssub, Member, Residency Training Committee, Year	If Academic Lead, CBD, note this in Program Secretary Description
Presenter, Academic Half Day, including MADs	Program Coordinator	4	Ssub, Presenter, Academic Half-Day, Core Curriculum, Occasion	Program Secretary description must not include the words "evaluator" or "anatomy" or "technical" or "surgical"

Activity	Who enters/who to call	Value	Path	Instruction/Note
Preparation/Marking Mock Written/Oral Exams	Program Coordinator	Submit hrs, max 25. Pts to be assigned manually at time of approval	Ssub, Examiner, Long Case/Oral/ STACER, occasion	Program Secretary description must include words "marking" or "preparation". Indicate number of hours in description.
Presenter, Anatomy or Technical Skills Session - includes SF activity, incl. Instructor, Clinical Skills	SF Program Coordinator (Jane Klie)	5	Ssub, Presenter, Academic Half Day, Core Curriculum, preentation	Program Secretary description must include one of "anatomy" or "technical" or "surgical"; mst not include word "evaluator."

Activity	Who enters/who to call	Value	Path	Instruction/Note
Additional teaching: activity within McMaster but outside of Academic Half Day; not limited to Surgery or FHS	Surgeon/Delegate	3	In MacFACTS, enter under Courses Taught, Additional Educational Contributions	Under Program select "Additional Teaching", provide details in Member's Comment area and enter date of session in Start/End dates. Note: Grand Rounds and Clinical Rounds presentations are not eligible for Merit. Member's Comment field should not contain "McMaster."
Off-Site Teaching (if no stipend paid) - Additional teaching activity outside McMaster	Surgeon/Delegate	3	In MacFACTS, enter under Courses Taught, Additional Educational Contributions	Under Program select "Additional Teaching", provide details in Member's Comment area and enter date of session in Start/End dates. Member's Comment field should not contain "McMaster."
Visiting Professor (if no stipend paid)	Surgeon/Delegate	6	Enter in STAR under Education and Career Experiences, Positions Held	Title/Position field should include "Visiting Professor", Type of activity should be "Academic", complete rest of form with details and date(s).

Activity	Who enters/who to call	Value	Path	Instruction/Note
CME Presenter/Facilitator (if no stipend paid) - McMaster or external (incl. CMAS courses, STEP, EFFORT, or other)	Surgeon/Delegate	3	Enter in STAR under Research & Scholarly Activities, Type = Presentation (Education)	Title or Rest of Citation fields should include " CME Presentation" and any further detail
Course/Curriculum Development	Surgeon/Delegate	Pts to be assigned manually at time of approval	In MacFACTS, enter under Contributions to Teaching Practice, Course/Curriculum Development	Advise Cathy Turner of details of any activity. Includes Course Director (9 pts) or Planner/Developer (6 pts)

TIP!

The screenshot displays the MacFACTS web interface. At the top left is the McMaster University Health Sciences logo. The main header reads "MacFACTS CVs made simple". A user greeting "Welcome, Todd Murray" is visible. Below the header, there's a "McMaster CV" section with a "Preview" button. The main content area is titled "CV of Academic S Testperson" and contains several form sections:

- NAME:** Given Name: Academic S, Last Name: Testperson
- ADDRESS:** Address: 4477 Happy Lane, City: Hamilton, Province: Ontario, Country: Canada, Postal Code: L8T 4L2, Email: Happy@mcmaster.ca, Phone: 905.388.2776
- PERSONAL DATA:** Date of Birth: 1944-12-01, Citizenship: CANADIAN
- EDUCATIONAL BACKGROUND:** Includes sections for Degrees and Diplomas, and Qualifications Licenses and Certifications.

On the left side, a vertical navigation menu lists various categories: NAME, ADDRESS, PERSONAL DATA, EDUCATIONAL BACKGROUND, PROFESSIONAL ORGANIZATIONS, EMPLOYMENT HISTORY, SCHOLARLY AND PROFESSIONAL ACTIVITIES, AREAS OF INTEREST, HONOURS AND AWARDS, COURSES TAUGHT, CONTRIBUTIONS TO TEACHING PRACTICE, SUPERVISORSHIPS, RESEARCH FUNDING, LIFETIME PUBLICATIONS, PRESENTATIONS AT MEETINGS, PATENTS AND COPYRIGHTS, ADMINISTRATIVE RESPONSIBILITIES, and OTHER RESPONSIBILITIES.

The headings listed on the left side of the MacFACTS interface will let you jump to different areas of the MacFACTS form with ease.

Other Teaching Activity (Postgraduate)

Examples of this type of postgrad teaching will likely include BHSc or Biochemistry, which are entered by the program. All other McMaster non-Faculty of Health Sciences teaching (i.e. Engineering or Psychology) is entered by the surgeon or delegate. All count per Master's or PhD student.

Activity	Value
MSc Thesis Supervisor, HRM/Med Sci/SSP	35
MSc Thesis Supervisor Committee Member, if not supervisor, HRM	23
MSc Thesis Proposal, Internal Reviewer, HRM/Med Sci	1.5
MSc Student Advisor, if not supervisor, HRM	10
MSc Scholarly Paper Reviewer, HRM	3
MSc Research Internship Supervisor, HRM	10
MSC Literature-Based Research Internship Supervisor, HRM	30
PhD Thesis Supervisor, HRM/Med Sci	48
PhD Thesis Supervisory Committee Member - not if supervisor, HRM	30
PhD Comprehensive Examination - Chair, HRM/Med Sci	6
PhD Comprehensive Examination - Examiner	5
PhD Thesis Examination - Chair	3
PhD Thesis Examiner	5
HRM Course Instructor	3/session

Special Instructions

MSc/PhD Supervisorships outside FHS or outside McMaster: in MacFACTS go to "Courses Taught", in STAR go to Education/Program Teaching and add new record. Under Program, choose "Mc-Master Teaching outside FHS"; in Role Description field choose one of the flwg: "Examiner, Thesis, PhD, Candidate" or "Supervisor, Thesis, PhD, Student per year", or "Supervisor, Thesis, MSc, Student per year". In Member's Comment field, add detail, i.e. name of student, faculty/department, etc. In Mode field, select relevant choice from pick list. Start and end date should be entered and should correspond to the current time frame or academic year, i.e. July 2017 to June 2018.

Other Teaching Activity (Undergraduate)

Examples of this type of undergrad teaching will likely include BHSc or Biochemistry, which are entered by the program. All other McMaster non-Faculty of Health Sciences teaching (i.e. Engineering or Psychology) is entered by the surgeon or delegate. All count per Master's or PhD student.

Activity	Value
Thesis Supervisor, 4th-year undergraduate courses, must include course code	24
Supervisor Senior Project, 3rd-year undergraduate courses, must include course code	12

Special Instructions

Teaching outside of FHS, Undergrad Research Courses: Please refer to Dept. Of Surgery MacFACTS manual (on MacFACTS website) for detailed instructions on how to enter this teaching activity.

Royal College Activities

All Royal College activities are entered by the Surgeon or Delegate. See the Surgery-Merit booklet on the STAR-CV website for further instructions on how to enter this type of activity.



Activity	Value	Path	Instruction/Note
Chair, RC Examination Board	250	Enter under Service and Administration, Administrative Committees	Select "Chair" in Role field; enter "Royal College Examination Board" in Committee Name field
Member Royal College Specialty/ Subspecialty Committee (includes CBD activity). Not eligible if Chair, Examination Board.	12/day Pts to be awarded manually	Enter under Service and Administration, Administrative Committees	Select Member in Role field; enter "Royal College Specialty Committee" or "Royal College Subspecialty Committee" in Committee Name field - name of committee can be added; specify number of days
Member Royal College Exam Committee - excludes Chair, must have activity outside of exam days	25	Enter under Service and Administration, Administrative Committees	Select Member in Role field; enter "Royal College Exam Committee" in Committee Name field
Examiner Royal College - not if Chair (includes all meetings and exams)	16/day Pts to be awarded manually	Enter under Research and Scholarly Activities - Other Professional Research Activities	Under Activity/Role Details enter "Royal College Examiner and specify dates; in Role field enter "Member" or leave blank
Writer, Royal College Exam Questions	2/question Pts to be awarded manually	Enter under Research and Scholarly Activities - Other Professional Research Activities	Under Activity/Role Details enter "Royal College Exam Question Writer" and specify number of questions

Dates should be entered as completely as possible (at least year and month); do not use entries such as "2012-present" for Merit activities as they may not be captured correctly.

The background features a grid of approximately 20 brain scan images, likely PET or SPECT scans, showing various cross-sections of a human head. The scans are arranged in a grid pattern, with some showing red and orange highlights indicating areas of increased activity. A hand is visible in the lower right corner, with the index finger pointing towards the center of the grid. The overall color scheme is light blue and white, with a soft gradient.

Research Activity

Publications, Presentations, Grants, and More

Please note that some research information, such as publications, may be entered already through the Office of Surgical Research Services, but please check that these entries are correct. It is extremely important that you enter the correct date for all activities, at least year and month, in order for the activity to be picked up by the Merit System for the correct academic year.



Publications	Allotment of Available Points	Points
First author - publication in a peer-reviewed journal	100%	Full article 100% Editorial 50% Letter to Editor 25% Case Report 25% Abstract 0% (See "Presentations" Sub-section) Points to be awarded based on impact factor of the journal: >30 — 30,000 pts 15-30 — 20,000 pts 5-14.99 — 10,000 pts 1-4.99 — 5,000 pts 0 -.99 — 2,500 pts NOTE: Please check your reports to ensure all publications are entered, if they are not, contact Cathy Turner for action.
Senior author - publication in a peer-reviewed journal	75%	
Named co-author - publication in a peer-reviewed journal	20%	
Unnamed co-author - group publication in a peer-reviewed journal	10%	
Group Authorship - Member of Writing Committee for a large RCT	50%	
Books - Editor		Editor: 50,000 pts Associate/Section Editor: 25,000 pts Managing Editor: 15,000 pts
Book (Research) - Author		If sole author of a book, contact Cathy Turner. Points to be awarded manually.
Book chapters - Author		First Author: 20,000 pts Senior Author: 20,000 pts Named Co-Author: 5,000 pts Unnamed Co-Author: 1,000
Publication of Guidelines	To be monitored - required info: authorship, role on committee, publication location. Points TBD	For further information on publication of Guidelines refer to Research/Medical Secretary Reference sheet (Page 19)

Special Instructions

Note: for help with entering Publications, please refer to the Research Secretary Reference sheet, or the Dept. Of Surgery MacFACTS manual online.

TIP!

When it comes to entering research activities, ensuring that the date field is accurate is of utmost importance. Inaccuracies with dates can cause activity to be missed by the Merit System! Always double check before finalizing your entries.

Presentations	Points	Instruction/Note
Invited Guest Speaker, Keynote Lectures, and Grand Rounds. NOTE: Grand Rounds at McMaster or hospitals do not qualify.	Keynote at National/International Mtg: 5,000 pts Invited Speaker at National/International Mtg: 3,000 pts Invited Speaker at Provincial Mtg: 2,000 pts Invited Speaker at Outside Grand Rds: 1,000 pts Invited Speaker at Local Events: 500 pts	These are non-peer reviewed presentations.
Presentations at peer-reviewed international or national meetings, workshops or symposia	First Author: 5,000 pts Senior Author: 2,500 pts Named Co-Author: 1,000 pts Unnamed Co-Author: 500 pts	For help with entering all Presentations, please refer to the Research Secretary Reference sheet, or the Department of Sugery MacFACTS manual online. csuweb.mcmaster.ca/appdev/macfacts/documents/2016MacFACTSSurgeryMerit.pdf For Merit, the field "Presenter Role" must be entered. This can only be done in STAR, not MacFACTS. Choose from First Author, Senior Author, Named Co-Author, Unnamed Co-Author.
Presentations at peer-reviewed provincial or local meetings, workshops or symposia, incl. Faculty Research Day	First Author: 2,500 pts Senior Author: 1,250 pts Named Co-Author: 500 pts Unnamed Co-Author: 250 pts	
Posters at peer-reviewed international or national meetings, workshops or symposia	First Author: 2,500 pts Senior Author: 1,000 pts Named Co-Author: 500 pts Unnamed Co-Author: 125 pts	
Posters at peer-reviewed provincial or local meetings, workshops or symposia	First Author: 1,250 pts Senior Author: 500 pts Named Co-Author: 250 pts Unnamed Co-Author: 125 pts	
Member or Chair, Organizing Committee of Research Conferences/ Workshops/ Symposia	Chair: 5,000 pts Member: 2,500 pts National/International: 100% Provincial/Local: 50% Non-peer reviewed: 25%	

Grants	Points
Grant PI or Co-PI Any research grant, regardless of source	<\$10K \$10-99K \$100-499K \$500-999K >\$1M
	1st year of grant 10,000 20,000 40,000 50,000 60,000
	Subsequent years 8,000 8,000 12,000 14,000 16,000
Co-Investigator or Site LPI for a multicentre study, regardless of source, where the PI is someone else	Per year 8,000 8,000 8,000 8,000 8,000

Education	Points	Instruction/Note
Completion of Advanced Research Training. NOTE: One-time entry, entered when training is completed	Any Master's degree: 10,000 pts Any PhD: 20,000 pts	In MacFACTS enter under Educational Background, Degrees and Diplomas
Completion of Advanced Research Training – GCP Training. NOTE: One-time entry, entered when training is completed	1,000 pts	In MacFACTS enter under Educational Background, Other Specialized Training. Enter "GCP Training" under Title/Position.



Peer-Review Activities	Points	Instruction/Note
Grant Review Panel, member (incl. MSA Grant Reviewer)	International: 3,000 pts National: 2,000 pts Provincial: 1,000 pts Local or Foundation: 500 pts	Must enter name of grant in Activity Name/Role field. Scope of activity, i.e. International, National, etc., must be entered in STAR, not MacFACTS
External Grant Reviews, peer reviewer	2,000 pts	Must enter name of grant in Activity Name/Role field
Journal Editorial Board, Editor or Co-Editor	Editor: 10,000 pts Co-Editor: 5,000 pts	Must enter "Editor" or "Co-Editor" in Activity Name/Role field
Journal Reviewer	1,000 per article	Must enter name of journal in Activity Name/Role field. Note details re: number of manuscripts for the current academic year in "Other Details"
Conference abstract reviewer	1,000	Must enter name of conference in Activity Name/Role field
External Reviewer for Postgrad Thesis	2,000	Must enter details (name of student, program, location) in Activity Name/Role field
HIREB/AREB member	5,000	Under Peer Review Activity, select "Other" under Role, REB/AREB Member under Activity Type, and enter "REB Membership" or "AREB Membership" in Activity Name/Role field
Major University or FHS Committee (not Dept. of Surgery) requiring significant time commitment, i.e. FHS Promotion and Tenure Committee	5,000	Points to be awarded manually; enter under Administrative Committees and contact Cathy Turner with details

TIP!

Enter all peer-review activities in MacFACTS under “Scholarly and Professional Activities” and then select category.

A man in a light-colored suit and tie is leaning over a desk, pointing with a pen at a document. A woman in a light-colored blouse is sitting at the desk, looking at the document. The background is a bright, out-of-focus office setting. The text "Pointers, Tips, and Tricks" is overlaid in a large, green, sans-serif font.

Pointers, Tips, and Tricks

Program Coordinator Notes & Instructions

The following are common errors and require special attention:

- Please note that there are many choices to pick from in the drop-down lists, however, only a limited number of these are “mapped” in the Merit system and will be picked up. Wherever possible, the correct choice is outlined in the “Path” column.
- The following teaching activities do not count for Merit but still need to be entered by the Program Coordinator for tracking purposes: Supervisor - Clinical Inpatient, Supervisor - Clinical Out-patient/Ambulatory Care, Supervisor - On Call, Supervisor - OR. One entry for the total activity/number of hours during the academic year for each category is sufficient.
- The following resident teaching activities are paid for by a different stipend and do not count toward Education Merit. These are entered by the Program Coordinator and include: Director - Residency Program, Director-Specialty Program (all five-year residency programs), Director - Subspecialty Program (all two-year residency programs), Director - CTU (Postgraduate only), Director - Fellowship, Mentorship, Research. Please note: The number of trainees must be entered for CTU Director.
- When entering Journal Club activity, please note the difference between Chair, Journal Club (1 entry per year) and Attendee, Resource Person or Participant (1 entry per session). See details under Postgraduate Activities for the appropriate category to choose.
- For preparation of questions/cases/scenarios for Mock Oral exams for residents, or marking of exams, do not use “Developer, Long Case/Oral/STACER/OSCE, case/question” — this role is not “mapped” in Merit and therefore will not be picked up if chosen. Refer to the instructions under Postgraduate Activities for entry.
- For Mock Oral exams for residents, points are awarded per session (not per person), so the “Number of Times” should be entered as 1 per session.
- When entering CaRMS activity, either Reviewer, Admissions or Interviewer, Admissions, remember to enter the number of files reviewed under the “Number of Times” field or the number of interviews conducted under “Number of Trainees.”
- “Presenter, Clinical Rounds” and “Presenter, Grand Rounds” do not qualify for Merit.
- Do not use the “Instructor, Clinical Skills” role in the drop down list — it is not mapped in Merit. Refer to instructions under Postgraduate Activities for “Presenter, Anatomy or Technical Skills Session” to enter these sessions.

TIP!

Some teaching activities do not count for Merit but still need to be entered. Review the list above to note which activities this refers to!

Notes & Instructions for Research Entry

Research Activity: Please refer to the Department of Surgery manual available on the MacFACTS homepage for complete instructions on data entry for research activities. Please note that there may be multiple drop down options; ONLY use those indicated in the instructions in order to confirm the role will be picked up for merit.

Grants: The biggest gap for entry here is a missing “Your Involvement” field! Please ONLY use STAR to enter Grants. While grants may be entered in MacFACTS or STAR, the field “Your Involvement” must be completed to be captured for Merit and can only be entered in STAR. Under “Your Involvement,” enter one of the following: “Grant PI”, “Grant Co-PI”, “Site LPI” or “Co-Investigator” — only these entries are captured for Merit. Under “Funding Type” select one of the following: Grant, Contract, Subgrant, or Subcontract. The fields Status, Role, Title, Funding Source, and Total Grant Amount must be completed. Total Grant Amount must be a whole number (i.e. No decimal places) and no \$ sign. Start and End dates (year and month) must be completed. Don’t forget to check off the “Show on CV” button if you want the grant to appear on your CV.

Presentations: For all presentations except Keynote Lectures, Invited Speakers, and Grand Rounds, you must choose one of the following three options under “Type.” Only these three options in the drop down list are captured for Merit.

1. Presentation at Meeting - Contributed, Peer Reviewed (Research)
2. Presentation at Meeting - Contributed, Non-Peer Reviewed (Research)
3. Poster Presentation (Research).

For instructions on entering Keynote Lectures, Invited Speakers, and Grand Rounds, please refer to the online manual. Only peer reviewed presentations count for Merit; check off “Peer Reviewed” if applicable. Geographical Scope, Presenter Role, and Date must be completed. “Presenter Role” must be entered in STAR, not MacFACTS. “Presentation (Education)” – should only be used for CME Presentations, either within McMaster or external.

Other Professional Research Activities: Member or Chair, Organizing Committee of Research Conferences/Workshops/Symposia – enter details of conference in the field Activity Name/Role Details; enter “Chair” or “Member” in the Role field. Start and end dates must fall within current academic year. Country and province (or country only if outside Canada) must be entered to be captured for Merit.

Publications: Most journal articles indexed in PubMed will be entered by the OSRS; if you note any are missing from your reports, please email Leigh Mahan at lema-han@mcmaster.ca and she will verify and enter the details of the publication. If you choose to enter a publication, please note the following: the Role field must contain one of the following – First Author, Senior Author, Named Co-Author, Unnamed Co-Author, Editor, Group Authorship; Publication Date must be filled in and fall within the current academic year for Merit; the “Peer Reviewed” box must be checked off for journal articles to qualify for Merit. Note: the Publication Status of articles, which are Accepted, In Press, or appear online first or E-pubbed in advance of being assigned to a specific journal issue is “Accepted/In Press.” The status should not be changed to “Published” until they appear “in print.” Publications do not count for Merit until they are “published,” which may be several months after they first appear online. For publication of Guidelines, note: for Publication Type select “Non Government Organization Guidelines/Publications;” select “First Author” in Role field; complete Author, Title, Publication Date, and Rest of Citation fields. Indicate scope of publication, i.e. provincial, national, etc., and time commitment. Points are awarded manually.

The most common mistake made during grant entry is leaving the “Your Involvement” field blank. This field is only available in STAR; not MacFACTS, so make sure you’re using the correct database.

Research Secretary Reference Sheet

1) Educational Background

- a) Degrees and Diplomas
- b) Qualifications, Licenses, and Certifications
- c) Other specialized training

2) Professional Organizations

3) Employment History

- a) University Appointments
- b) Consulting
- c) Other

4) Scholarly and Professional Activities

- a) Conference Reviewer
- b) Editorial Boards
- c) Executive Positions
- d) External Grant Reviews
- e) Grant & Personnel Committees
- f) Grant Review Panel Member
- g) Journal Referee
- h) Other

5) Areas of Interest

- a) Consulting
- b) Research
- c) Teaching
- d) Other

6) Honours and Awards

7) Courses Taught

- a) Undergraduate Teaching
- b) Postgraduate Teaching
- c) Other
- d) Additional Educational Contributions

8) Contributions to Teaching Practice

- a) Innovation
- b) Leadership
- c) Course/Curriculum Development
- d) Development/Evaluation of Education Material
- e) Other

9) Supervisorships

- a) Supervisory Committees
- b) Other

10) Research Funding

- a) Grants

11) Lifetime Publications

- a) Refereed Journal Articles
- b) Peer Reviewed Journal Articles
- c) Accepted for Publication

12) Presentations at Meetings

- a) Invited Presentations
- b) Poster Presentations
- c) Presentations

13) Patents and Copyrights

- a) Copyrights
- b) Patents

14) Administrative Responsibilities

- a) Faculty

15) Other Responsibilities

- a) Administration
- b) Clinical/Health Services
- c) Education
- d) Research

Merit Entry Training Booklet

Did you know that there's an extremely helpful guide specific for surgical Merit entry available online? Visit macfacts.mcmaster.ca and scroll until you see "Online Help Resources." Under the "CV and Program Secretary Booklets and Videos" section, click "Surgery Merit Data Entry Booklet."

This link will open the guide, which can be downloaded and printed for your convenience. Prepared by McMaster University's Computer Services Unit (CSU), the Surgery Merit Data Entry Booklet walks you through different data entry examples using screenshots and other graphics to make for easier understanding.

If you have any questions during data entry, please contact the people listed in our "Important Contact Information" section below!



Important Contact Information

Leigh Mahan

Research Assitant

lemahan@mcmaster.ca

Cathy Turner

Director of Administration

cturner@mcmaster.ca

The Office of Surgical Research Services

905 522 1155 x 34194

osrsadm@mcmaster.ca

Barb Halliday

Training and Support Specialist

bhallid@mcmaster.ca

Surgery

