

**Study Leave Policy for Medical Trainees**

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| Consultation / Acknowledgements with Stakeholders |
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# Introduction / Purpose

The purpose of this policy is to detail the management of study leave for trainee doctors to ensure that the process is both transparent and effective. The types of activities that constitute study leave include:

* Internal training courses.
* External training courses.
* Private study time.

Regardless of the reason for study leave it is mandatory for the trainee to follow the appropriate procedure for their grade and to complete the appropriate application form.

# General Principles / Target Audience

This policy applies to Foundation Year (FY) 2 who are employed by the Trust. It also applies to Specialist, and General Practitioner Specialist trainees (GPST) employed through Health Education England North West Lead Employer (St Helen’s and Knowsley Teaching Hospitals) whilst working at Blackpool Teaching Hospitals Foundation Trust. The process for study leave for each trainee group is compliant with Health Education England North West (HEE NW) guidance.

Foundation Year 1 trainees are not eligible for formal study leave. A formal teaching programme, organized by the Foundation Programme Directors, is in place and all Foundation Year 1 trainees are expected to attend. It is also anticipated that reasonable time will be allocated within working hours for attendance at internal training events. The Trust additionally requires that all Foundation Year 1 trainees are trained to Advanced Life Support (ALS) standard in preparation for inclusion on the Cardiac Arrest Team. As a result, all trainees will be granted leave with pay and course fees to attend the ALS course which is facilitated internally.

# Definitions and Abbreviations

ACCS Acute Care Common Stem

ALS Advanced Life Support

ATLS Advanced Trauma Life Support

CMT Core Medical Trainees

CST Core Surgical Trainees

DME Director of Medical Education

FPD Foundation Programme Director

FSD Foundation School Director

FTTA Fixed Term Training Appointment

FY Foundation Year

GMC General Medical Council

GP General Practitioner

HEE NW Health Education England North West

HME Head of Medical Education

LAT Locum Appointment for Training

PGM Postgraduate Manager

ST Specialist Training

TPD Training Programme Director

UKFPO UK Foundation Programme Office

# Policy

## Foundation Year 2 Trainees

* Study leave can only be used to support the aims of the Foundation Programme, achieve the foundation outcomes and explore career opportunities and improve wider professional development.
* The Foundation Study Leave Policy can be found here: <https://www.nwpgmd.nhs.uk/foundation-policies-and-processes>
* Foundation doctors in year 2 have 30 days paid educational time, 20 days of which should be allocated to the generic teaching programme. F2 doctors may take up to an additional 10 days study leave, as long as this is approved in advance by the Foundation Programme Director (FPD) and is consistent with maintaining essential service.
* The study leave budget is top sliced to support the formal teaching programme.
* The approval of study leave and funding is discretionary.
* Approval will be given by the Foundation Programme Director (FPD) based on the trainees individual education plan, the amount of funding available, and the amount already awarded in the year.
* All Foundation doctors will receive study leave and funding for their ALS course (first attempt only).
* The Advanced Trauma Life Support (ATLS) and Advanced Paediatric Life Support (APLS) courses can be supported by study leave resources, as it appears that credit is given for this course in some Specialist Training (ST) applications, even though this is not necessarily signalled in the job specifications on the various websites.
* Similarly Basic Surgery Skills (BSS) courses can be supported from the study leave allowance.
* Retrospective leave will be rejected.
* Any incomplete forms will be returned.
* Foundation doctors who are training less than full time are entitled to pro-rata access to study leave resources.
* Trainees must not pay any money in advance for study leave before the application is approved.
* Study leave cannot be used to sit examinations for Speciality Training or courses specifically aimed at the recruitment process.

Study leave funding will not be available for the following:

* National professional examination / College examination courses and preparation courses, including other expenses involved in undertaking them.
* Courses / events run overseas. In exceptional circumstances approval may be given by the Postgraduate Dean in advance on the grounds that there is no opportunity to gain the identified foundation competences or experience from any other local or regional course or event. There will be a cap of £400 on the maximum study leave resources available to support course / conference fees and travel for a single overseas application. Trainees will need to explore alternative funding arrangements for accommodation associated with overseas trips.
* Commercial preparation for specialty / GP recruitment courses. Such training should be delivered, as part of the generic teaching programme, utilising local and HEE North West resources.
* Catering expenses for trainees attending the trusts formal teaching programme.

Study Leave Process:

* The Foundation Programme Director (FPD) will approve study leave for Foundation Year 2 trainees.
* Applications for study leave must be submitted at least six weeks in advance of the course / event and whenever possible details of the course/event must be attached with the application. Applicants will be required to demonstrate how the course / event maps to the competencies of the Foundation curriculum.
* An application form which is available from the Medical Education Team (see Appendix 4) must be completed and must be approved and signed by the trainee’s Educational Supervisor and by the Rota Coordinator.
* The completed application form must be returned to the Foundation Programme Administrator (FPA) with supporting evidence of the course that the trainees wishes to apply for.
* The trainee will then receive a letter confirming whether study leave / funding has been awarded within one week.
* To claim the study leave, the trainees must complete an application through E Expenses system via the Trust intranet within three months of completion of the course and attach proof of completion of the course and receipts of payment. This application is received by the Postgraduate Manager.
* An appeal against decisions can be made through the Medical Education Committee.

Career Taster Sessions:

* Taster sessions will be available early in the Foundation Year 2 programme; however they can also be undertaken in the final placement of Foundation Year 1. Any study leave granted for these taster sessions will come out of the trainee’s Foundation Year 2 allowance.
* The UK Foundation Programme Office (UKFPO) (UK Foundation Programme, 2016) define a taster as ‘a period of time, usually 2-5 days, spent in a speciality in which the foundation trainee has not previously worked, which enables the development of insight into the work of the speciality and which promotes careers reflection’.
* The HEE NW / UKFPO guidance on specialty tasters for Foundation trainees can be found here:

 <https://www.nwpgmd.nhs.uk/foundation-policies-and-processes>

* The UKFPO guidance on specialty tasters for Foundation Year trainees includes the aims and background, followed by advice on developing high quality tasters including essential components, seven steps to developing local opportunities and tips for specialty / areas to ensure the best experience for the trainees. The guidance covers information about developing a register of tasters, the Foundation School Director (FSD) and FPD roles and responsibilities.
* The UKFPO has developed a taster reflection form, which is incorporated in the e-Portfolio (Horus). Trainees should complete this form, as information from this is collected to provide a register of tasters.
* Taster approval in the third FY placement is subject to adequate cover in the clinical placement being in place, and should not take place during shadowing for the new intake of FYs.
* The Health Education England North West Foundation School encourages the use of study leave during the third placement in Foundation Year 1 and throughout Foundation Year 2 for trainees to explore career opportunities.
* The Foundation School expects every Foundation Programme Director (FPD) to establish and maintain a published list of currently available taster sessions for their foundation trainees which should be easily accessible.
* The local arrangements for trainees (especially Foundation Year 1) to undertake career taster sessions should be included in the programme Study Leave Policy / Guidance.
* FPD’s should ensure a reflection form is entered in the e-Portfolio for the taster, as proof of attendance and of educational value. The contents of the reflection form can be private, but it is suggested this is shared with an educational supervisor in a careers discussion.
* Although the UKFPO definition specifies specialty there may be other valuable opportunities such as learning about public health, medical leadership or medical publishing.
* Each foundation programme should maintain and regularly update a list of tasters taken by their trainees, with details of the taster supervisors, including contact details.
* Foundation programmes are encouraged to share their list of taster programmes / supervisors with other programmes in the school. Where a programme can provide a taster experience not readily accessible to a trainee in another foundation programme, it is recommended that the viability of cross-sharing tasters is discussed.

Study Leave Flowchart:

* See Appendix 1.

## Specialist Trainees

The study leave application process for Specialist Trainees, as delineated by Health Education England North West, is to approve time off as well as expenses. There are two parts to the process:

* + 1. **The Application**

This is the part of the process that involves getting approval for the time off and for any funding associated with the leave. Trainees are unable to claim any expenses unless they have had them approved first.

* + 1. **The Claim**

The process involved to be reimbursed expenses associated with the Study Leave. Trainees may only claim expenses after their application has been fully approved.

* + 1. **General Information**

The study leave budget years run from 1 March to 28 or 29 February each year, although the core medical and core surgical programmes consider funding requests on an August to August basis. The year in which funding will be taken is based on the year in which the first day of the study leave falls, not on the year which it was applied for.

The year from which the number of days allowed is calculated runs from 1 October to 30 September each year.

* + - 1. **Core Trainees**

Study leave is normally permitted up to a maximum of 30 days per year (15 days per half year).

* + - 1. **Specialist Registrars and Higher Specialty Registrars (ST3 and above)**

Study leave is permitted for a maximum of 30 days per annum.

* + - 1. **Fixed Term Training Appointments (FTTAs)**

Study leave is permitted for a maximum of 30 days per annum or pro rota when the appointment is for less than a year.

In some circumstances, 15 of the 30 days will be taken for the formal teaching programmes organised by the individual specialties. Trainees are asked to check with their Training Programme Director (TPD). Full Time Trainees may be granted up to a maximum of 7 days leave per year for private study. The allowance for LTFT trainees is calculated pro-rata.

Trainees who are absent from work on sick leave are not usually eligible for study leave unless there are exceptional circumstances. Those trainees who are on maternity or paternity leave should have access to study leave only in exceptional circumstances. Please see the full guidelines for further details:

<https://www.nwpgmd.nhs.uk/studyleave>

### Guidance for Applying for Study Leave

The latest version of the study leave application form can be downloaded from the following website:

<https://www.nwpgmd.nhs.uk/studyleave>

Applications should be submitted to the Study Leave Administrator at least 6 weeks prior to the proposed leave. Retrospective applications will not be considered. Blackpool Teaching Hospitals NHS Foundation Trust requires notification of any proposed leave at least six weeks in advance of the course date.

Applications should be submitted to the correct Study Leave Administrator for the trainee’s specialty, the trainee needs to gain approval from their Educational Supervisor and Rota Coordinator, and check the appropriate boxes on the FS1 form. The emails confirming approval no longer need to be forwarded on with the FS1 form but must be available to HEE NW upon request.

Core Medical Trainees (CMT), Core Surgical Trainees (CST), Acute Care Common Stem (ACCS) trainees and Anaesthetic trainees at Grade ST1 and ST2 have Study Leave Administrators based on their sector, details of which are available on the website above.

Psychiatry trainees should use the online School of Psychiatry form (linked from the Study Leave website above) which will automatically forward applications to the Study Leave Administrator for Psychiatry. Applications should not normally be sent to the HEE NW Study Leave Administrator.

Applications should not normally be sent directly to the trainee’s TPD. An exception would be where their TPD is also their Educational Supervisor.

When calculating study leave, all the days approved and carrying a liability for expenses are counted, including weekends and Bank Holidays. Time spent travelling to and from the event is also counted.

If the trainee is presenting at a conference they are applying for, either a poster or verbal presentation, then they are asked to provide confirmation of this when they apply for study leave.

#### Overseas Applications

Overseas study leave can be approved for higher specialist trainees in exceptional circumstances. Overseas is defined as any country outside of the UK.

If study leave is approved for an overseas event, only one funded trip is normally allowed during the whole of a trainee’s training, anything outside of this will be considered at the TPD’s discretion. The final decision lies with the Postgraduate Dean.

Study leave overseas will not be granted for the purpose of studying for an overseas qualification or to attend examinations overseas.

Generally, only one overseas trip will be funded in the whole of a trainee’s training (not per annum). There are circumstances that will be considered flexibly by TPDs.

#### Changes to Approved Study Leave

Trainees must notify HEE NW of any changes to their approved study leave at the earliest opportunity. This includes cancellations, date changes and changes to fees. Failure to notify HEE NW may cause delays in the processing of the trainee’s claim, or may result in the trainee not getting reimbursed for the expenses they were expecting.

#### The Claim

Once the Study Leave Administrator has forwarded on to HEE NW, the HEE NW Study Leave Administrator enters all applications on to the study leave database. They will also confirm approval with the trainee and email them an expenses claim form (FS2).

Expense claim forms must be submitted within 3 months of the start date of the course, or before the end of the February following the start of the course, whichever comes first (i.e. by the end of the budget year from which the funding will come from).

All claims must be supported by receipts. Certificates of attendance are not acceptable as proof of payment unless they specifically state that the trainee has paid and the amount.

Trainees are asked to quote their reference number in the top right hand corner of the claim form. Their reference number is the six digit number which can be located on the top right hand corner of the approved application form and in the subject line of the approval email.

Trainees must sign and date the second page of the claim form. Please note that claims cannot be processed until after the first day of the study leave.

#### Expenses

A nominal sum of funding per trainee is allocated each budget year. As a guide for the 2019/20 budget year the nominal per capita allocation is £764 for a full-time trainee. The allocation for part-time trainees and trainees employed for only part of a budget year is calculated on a pro rota basis. Some specialties may have their allocation top-sliced and are asked to check with their TPD about whether this happens in their specialty.

Additional rules may apply for the trainee’s specialty (particularly for CMT). Trainees are asked to check with their TPD.

Travel expenses will paid at 23p per mile, up to a maximum of a standard class return rail fare from the trainee’s base hospital to the course / conference venue (unless overseas) (NHS Health Education England (North West Office), 2018).

Accommodation is paid to a maximum of £55 per night (bed and breakfast) and subsistence is paid to a maximum of £20 per day.

Examination fees will not be reimbursed.

#### Process Flowchart

Refer to Appendix 2.

## GP Specialty Trainees

### Study Leave Process

All requests for study leave are to be approved by HEE NW.

Study leave is not an entitlement and cannot be absolutely guaranteed. Leave must be applied for in advance and forms approved in accordance with the study leave process (see below) prior to submission to HEE NW.

Trainees are requested to submit applications for study leave six weeks prior to the course date. Retrospective approval will be granted up to four weeks after the course date if necessary.

Refer to Appendix 3.

### Application Forms

A study leave submission form must be completed in full. Trainees can download a form from the following website:

<https://www.nwpgmd.nhs.uk/general-practice/gpst-study-leave>

The study leave process requires trainees to email application forms to their TPD or their administrator. Some TPDs would prefer trainees to email themselves directly rather than an administrator.

### Guidelines and Principles

The full study leave guidelines and principles can be downloaded here:

<https://www.nwpgmd.nhs.uk/general-practice/gpst-study-leave>

### Travel to GP Teaching

Trainees are entitled to claim travel expenses to GP Teaching by completing an EDUC form (available via the website link above) and emailing it to the HEE NW administrator for their area. Please note that trainees may only claim mileage from their normal place of work rather than from their home address.

## General Guidance Notes

All trainees should consider the following points when applying for study leave:

* Approved study leave must be relevant to the trainee’s educational needs, appropriate to their level of experience and supportive to the training programme for which the trainee is enrolled.
* Taking other paid employment during any period of study leave will be considered gross misconduct with referral to the General Medical Council (GMC).
* Wherever possible trainees should attend courses near to their training base and within their region before requesting to attend external courses.
* Trainees should not register or pay for any course or examination prior to obtaining approval for it. Repayments in these circumstances are not guaranteed.
* Trainees must follow the process of approval using the correct forms and procedures
* Trainees must ensure that one study leave form is completed for each course: multiple claims on a single form will invalidate the request.
* Trainees must obtain authorisation from their divisional Rota Coordinator to arrange for a member of their team to provide cover for study leave absences, including any on-call hours if appropriate. The trainee must also obtain the Educational Supervisor’s signed consent.
* For quality control purposes trainees should complete a study leave feedback form at the end of a training course and return it to the Study Leave Co-ordinator.
* Study leave entitlement cannot be carried over from one year to the next. A trainee’s entitlement to study leave begins on their rotation start date at Blackpool Teaching Hospitals NHS Foundation Trust.
* Trainees who are less than full-time working will be allocated study leave (days and funding) on a pro rate basis in compliance with the GMC.

## Budget and Expenses

Study leave expenses considered for valid payments include:

* Approved registration and/or course fees.
* Travel expenses at the rate of standard class.
* Subsistence allowances.

Approved expenses may only be reimbursed following attendance at the educational activity, with appropriate receipts, certificates of attendance, and feedback forms. The reimbursement of expenses does not apply to private study leave.

## Application Period

Study leave should be planned as far in advance as possible. Requests should be submitted at least six weeks before the proposed start date. Retrospective applications for study leave will not be considered for authorisation.

## Private Study Leave

Private study leave will be supported at the discretion of the postgraduate Clinical Supervisor prior to an examination, or in the case of a Foundation Year 2, taster sessions.

## Authorisation Criteria

Study leave will not be automatically granted. Trainees must obtain authorisation in advance for both time off and associated financial support.

It is the responsibility of the trainees to ensure that appropriate approval has been obtained prior to requesting study leave. Unofficial absence from duty is regarded by the Trust as a breach of contract and will lead to disciplinary action.

## Appeals

Postgraduate Educational Supervisors will support appropriate study leave applications but are mandated to uphold guidelines as per the GMC and HEE NW. They aim to be equitable to ensure that all trainees have equal and fair access to study leave.

All trainees have the right to appeal if they feel their application for study leave has not been adequately supported. Foundation trainees can appeal through the Medical Education Committee. Hospital Specialty and GP trainees who wish to appeal against a decision to reject their study leave application should refer to HEE NW’s Non ARCP Appeal Process which is accessible here:

[https://www.nwpgmd.nhs.uk/policies-procedures](https://www.nwpgmd.nhs.uk/policies-procedures%20)

However, the appeal should be directed to the relevant HEE NW study leave email address.

## Review of this Policy

This policy is to be reviewed annually; but as the HEE NW terms and process for study leave are subject to change by HEE NW, please consult the HEE NW website for the most up to date information.

# References and Associated Documents

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[Accessed 22/07/2020].

| Appendix 1: Study Leave Flowchart |
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| FY2 Doctor completes Application for Study Leave Form and sends with supporting evidence to the Foundation Programme Administrator to review contentThe Postgraduate Manager runs a report of allocated study leave for this doctor in the current year which is given to the Foundation Programme DirectorApprovedNot Approved FPD makes a decision on whether to approve leave and/or funding based on submitted informationFPA sends confirmation letter to TraineeFPA sends confirmation letter to the TraineeTrainee completes E Expenses to make a claim and attaches receipts and proof of attendance to claimTrainee should inform FPA that this has been completedIf required an appeal against the decision can be made to the Medical Education CommitteePostgraduate Manager approves payment and records on database |

| Appendix 2: Process Flowchart |
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| Trainee downloads application form and completes sections A, B, and C |

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| Trainee emails the form to their Educational Supervisor and Rota Coordinator to obtain approval for the proposed leave |

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| The Educational Supervisor and Rota Coordinator email confirmation of approval back to the trainee |

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| The trainee forwards the application form to the relevant Study Leave Administrator for their Training Programme Director (TPD) (Approval emails need not be sent at this point but must be available on request from HEE NW) |

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| The TPD’s Study Leave Administrator checks that approval from the Educational Supervisor and Rota Coordinator have been granted and forwards the application to the TPD |

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| The TPD considers the application and emails back to the Study Leave Administrator to confirm whether it has been approved |

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| The TPD’s Study Leave Administrator forwards this email to the HEE NW Study Leave Administrator |

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| If the application is for an overseas trip, the application is then referred to the Postgraduate Dean at HEE NW for approval. They will then confirm whether the application has been approved or not to the HEE NW Study Leave Administrator |

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| The HEE NW Study Leave Administrator will then enter the details of the application on the HEE NW system and email the trainee to confirm that it has been approved, along with an expenses claim form |

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| The expenses claim form should then be completed by the trainee and returned to the HEE NW Study Leave Administrator along with receipts for all expenses. If there are no receipts, expenses will not be refunded (with the exception of travel where the cost of a standard 2nd class rail fare will be refunded if no receipts are provided) |

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| The expenses will then be refunded with the trainees usual pay at the next possible pay day |

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| Appendix 3: Study Leave Process |
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| Trainee downloads study leave application form from the HEE NW website<http://www.nwpgmd.nhs.uk/general-practice/gpst-study-leave>  |

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| Trainee completes application form prior to the course, after discussion with EducationSupervisor and Rota Master (if applicable) and ticks the appropriate boxes |

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| Trainee emails the form to the Training Programme Director (or their administrator) – please refer to the contact list provided on the HEE NW website |

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| Training Programme Director approves study leave and emails the form directly to the HEE NW Administrator for processing |

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| Trainee receives confirmation email from the HEE NW that the application has been approved |

On completion of the course:

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| Trainee completes EDUC form which must be EMAILED to the HEE NW Administrator within 3 months of the course ending. When the EDUC form has not been signed by the course organiser, a certificate or proof of payment will also be required this must also be attached to the same email. Please ensure you only send ONE email to the HEE NW Administrator following the course with all the required attachments. |

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| HEE NW Administrators will send reimbursement claims off in the form of a report to St Helens & Knowsley on a monthly basis. If you do not receive payment within two months of submitting your claim please contact St Helens & Knowsley payroll on 0151 290 4516  |

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| Appendix 4: Application form for FY2 Study Leave |
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| Appendix 5: Equality Impact Assessment Form |
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| **Department** | Medical Workforce | **Service or Policy** | CORP/POL/546 | **Date Completed:** |  |
| **GROUPS TO BE CONSIDERED**Deprived communities, homeless, substance misusers, people who have a disability, learning disability, older people, children and families, young people, Lesbian Gay Bi-sexual or Transgender, minority ethnic communities, Gypsy/Roma/Travellers, women/men, parents, carers, staff, wider community, offenders. |
| **EQUALITY PROTECTED CHARACTERISTICS TO BE CONSIDERED**Age, gender, disability, race, sexual orientation, gender identity (or reassignment), religion and belief, carers, Human Rights and social economic / deprivation. |
| **QUESTION** | **RESPONSE** | **IMPACT** |
| Issue | Action | Positive | Negative |
| What is the service, leaflet or policy development?What are its aims, who are the target audience? | See Purpose |  |  |  |
| Does the service, leaflet or policy/ development impact on community safety* Crime
* Community cohesion
 | No |  |  |  |
| Is there any evidence that groups who should benefit do not? i.e. equal opportunity monitoring of service users and/or staff. If none/insufficient local or national data available consider what information you need. | No |  |  |  |
| Does the service, leaflet or development/ policy have a negative impact on any geographical or sub group of the population? | No |  |  |  |
| How does the service, leaflet or policy/ development promote equality and diversity? | No |  |  |  |
| Does the service, leaflet or policy/ development explicitly include a commitment to equality and diversity and meeting needs? How does it demonstrate its impact? | No |  |  |  |
| Does the Organisation or service workforce reflect the local population? Do we employ people from disadvantaged groups | No |  |  |  |
| Will the service, leaflet or policy/ development1. Improve economic social conditions in

deprived areas1. Use brown field sites
2. Improve public spaces including creation of green spaces?
 | No |  |  |  |
| Does the service, leaflet or policy/ development promote equity of lifelong learning? | No |  |  |  |
| Does the service, leaflet or policy/ development encourage healthy lifestyles and reduce risks to health? | No |  |  |  |
| Does the service, leaflet or policy/ development impact on transport?What are the implications of this? | No |  |  |  |
| Does the service, leaflet or policy/development impact on housing, housing needs, homelessness, or a person’s ability to remain at home? | No |  |  |  |
| Are there any groups for whom this policy/ service/leaflet would have an impact? Is it an adverse/negative impact? Does it or could it (or is the perception that it could exclude disadvantaged or marginalised groups? | No |  |  |  |
| Does the policy/development promote access to services and facilities for any group in particular? | No |  |  |  |
| Does the service, leaflet or policy/development impact on the environment* During development
* At implementation?
 | No |  |  |  |
| **ACTION:** |
| **Please identify if you are now required to carry out a Full Equality Analysis** | **~~Yes~~** | **No** | **(Please delete as appropriate)** |
| **Name of Author:****Signature of Author:** |  | **Date Signed:** |  |
|  |  |
| **Name of Lead Person:****Signature of Lead Person:** |  | **Date Signed:** |  |
|  |  |
| **Name of Manager:****Signature of Manager** |  | **Date Signed:** |  |
|  |