



Health Education England

Curriculum Study Leave Policy

August 2016

Version 2016-3

This document is published by:

The Educator and School Development Team
Health Education England (working across the East Midlands)

It applies to all trainees in the East Midlands region
It does not apply to non-trainee grade doctors

It supersedes all previous versions and is effective from 2 August 2016

Hard copies are not provided and should be avoided. All amendments will be published online on our website

A note about the updated version

The revised CSL policy has been simplified following experience and feedback since it was introduced in August 2013.

Key differences

1. The overall policy is much shorter including the background and some of the explanatory notes.
2. The classification of study leave into **Internal** and **External** has been clarified.
3. Rules for private study leave have been simplified to allow for up to five days with School approval.
4. Rules about taking leave over weekends and other non-working days have been clarified. Trainees have now been given the option of either taking days off in lieu or in not claiming for the time.
5. The blanket policy of not supporting overseas courses has been removed. Instead overseas courses can be approved by the School as an 'Exception Application' with guidance notes included in Appendix D.
6. The appeals process has been simplified.

Feedback

We hope that you find this document clear and informative. We welcome feedback so if you'd like to provide some, please email us on heem.csl@nhs.net. Thank you.

The policy

Introduction

This document sets out the policy for Curriculum Study Leave (CSL) in Health Education England working across the East Midlands (HEE-EM) for all Doctors and Dentists in training (trainees).

HEE-EM uses an online system called **Intrepid Leave Manager** (Leave Manager) for trainees to request approval for study leave for events (including courses, conferences and exams) and private study required to meet their curricular requirements. Some Trusts require the trainee to also apply for leave for regular internal teaching using this system. All applications must be submitted in advance using Leave Manager. Leave Manager will not accept applications after the study leave has taken place.

Each trainee will have an annual individual study leave budget as well as an overall entitlement of 30 days' study leave which is split into internal and external. Leave Manager will only allow trainees to submit applications which do not exceed their remaining entitlement.

There are two types of application: Standard and Exception. Schools maintain a list of events approved for particular grades and specialties. To apply for these, a **Standard** application needs to be made. For events not on this list, an **Exception** application should be made.

Approval chains are short – in most cases with just one person required (to approve the time off). The table below lists the possible number of approvers required for each type of application:

| Standard Applications | Exception Applications |
|---|---|
| GP Programme Office (GP trainees only) | GP Programme Office (GP trainees only) |
| Trust or Practice approver for time off | Trust or Practice approver for time off |
| (no further approval required here) | TPD/Head of School (exception approver) for educational suitability. For some GP schemes the Programme Office performs this function. |

The CSL application process is as follows:

1. Trainee applies on Leave Manager and includes any estimated expenses
2. Approval of time off
3. Approval of educational suitability (if required)
4. After leave has taken place trainee claims expenses from employer (if relevant)

Applications may not always proceed as expected. Please refer to Appendix A for potential reasons for this.

Types of study leave

Study leave is divided into two parts: Internal and External. Please see Appendix B for allocations for each School. The TPD can request a change the ratio of external to internal leave as long as this applies to all trainees at the same stage of the training programme. This is usually done annually.

There is an annual allocation of money for each trainee. Some of this money may be 'top sliced' by the School to support curriculum delivery. Top slicing means that a portion of the overall budget allocated to trainees is deducted from the final amount given to trainees, thereby reducing the amount that a trainee can draw down. Please Appendix B for details of allocations.

Internal Study Leave

- a) This will include locally delivered teaching, for example weekly afternoon teaching and monthly regional teaching and any protected teaching time within job plans. Generally this leave does not need to be applied for on Leave Manager; however some Trusts require trainees to do so. Trainees are advised to check in each Trust as practice could be different around the region.
- b) Internal leave also includes internal events and, for Foundation trainees, taster sessions. This needs to be applied for on Leave Manager.
- c) Trainees should inform their TPD and/or Head of School should they feel that they are not receiving their entitlement of internal study leave.

External Study Leave

- a) External leave is for events provided outside the region. It also includes Private Study Leave and Exam Leave.
- b) Events not on the pre-approved list for the trainee's grade and specialty will be considered, as exceptions, by the TPD or Head of School (the Exception Approver on Leave Manager). These exceptions should be of educational benefit and value for money. Exception requests always come from a trainee's external entitlement.

Private Study Leave

Private Study Leave can be taken for up to 5 days per year and the reasons for the leave must be declared when applied for, and approved by the School. This comes out of the external allocation. Private study leave would usually be for exam preparation.

Examination Leave

- a) Examination leave can be given for examinations that are part of the structured training programme and necessary for the acquisition of a CCT.
- b) Examination leave can only be approved with pay and expenses (not including professional fees) within the United Kingdom for a maximum of two attempts at any one part of the examination.
- c) If approved by the Head of School, study leave time (but not funds) can be granted for third and subsequent attempts at an examination.
- d) Subsistence and travelling expenses claims to and from the venue may be payable if set out in the original application and subsequently approved. For examinations in Ireland second class rail and the cheaper of flight or ferry will be paid.
- e) Professional examination fees are never reimbursed.

When not to apply for CSL

Leave for Mandatory Teaching expected of your employer, Interview Leave and Employer Related leave do not come under CSL and this leave should not be booked on Leave Manager.

Study Leave Entitlements

- a) The study leave year runs from changeover date in August to the changeover date the following August except for programmes with nationally agreed start dates in September, where the leave year is September to September.
- b) Unused study leave entitlement (eg days or money) cannot be carried forward to the next leave year.
- c) Less Than Full-time Trainees (LTFT) receive study leave pro-rata to a whole time trainee in any one year. If the number of days in any one year is exceeded discretion can be used during the approval process.
- d) Trainees on maternity leave will receive a reduced entitlement for this period (please see Appendix B).
- e) Trainees who start or complete their training part way through the study leave year will receive a pro-rata entitlement until the end of the leave year. This also applies to trainees who start in February.
- f) Entitlement to CSL ends once a trainee reaches CCT and trainees are not entitled to CSL during the Period of Grace.
- g) Trainees on Out of Programme Experience (OOPE), Out of Programme Research (OOPR) or Out of Programme Career Break (OOPC) are not entitled to CSL for the period they are out of programme. Trainees on Out of Programme Training (OOPT) are normally only entitled to CSL for this period if they are occupying a training post on a training programme in our region.
- h) For study leave taken over weekends, bank holidays and days when the trainee would not otherwise be working trainees can either take time off in lieu or not declare those as time off in their application process.

Applications for study leave

- a) Applications should be consistent with the aims of the trainee's PDP, as agreed by their Educational Supervisor.
- b) All CSL must be applied for through Leave Manager. This includes any event for time only.
- c) Applications must be made at least six weeks before the period of leave.

Reimbursement of study leave expenses

- a) Claims for reimbursement of expenses must be made to the trainee's Employing Trust/GP Programme Office within six weeks of the leave being completed.
- b) Claims can only be made against leave that was prospectively approved using Leave Manager and where the estimated expenses were included on the application. Trainees are therefore reminded to include estimated (or actual) costs on their application.
- c) Evidence of attendance, such as a certificate of attendance and evidence of approved expenses, such as travel receipts, are mandatory for making a claim.
- d) Claims must be made using the appropriate Trust/GP Programme Office process. Late claims will not be reimbursed unless accompanied by a letter setting out the exceptional circumstance that led to the delay.
- e) Unless special considerations exist, Trusts should pay all reasonable expenses approved on Leave Manager, in line with applicable rates.
- f) Where possible, trainees must take advantage of concessionary fares. 'First class' and other premium class travel will not be reimbursed.
- g) In addition to course fees, the following expenses can be applied for: Overnight accommodation, staying with friends or relatives, mileage or travel costs and meal allowances (please see Appendix C for details).
- h) Unauthorised Costs include:
 - Examination fees
 - Credit card charges
 - Conventions
 - Ceremonies
 - Retrospective applications
 - Excess expenses will not be refunded

Special Cases

Academic Trainees

- a) Only applications related to postgraduate clinical training should be made using Leave Manager.
- b) Study leave related to academic research that is additional to the acquisition of the relevant GMC approved curricular competencies should not be funded by the Study Leave budget, but through the funding source for the trainee's academic research; for example via the University.

Funding for Higher Degrees that are not required for the CCT

- a) The CSL budget is generally not an appropriate source of funding for higher degrees and approval is not usually given. When, exceptionally, a higher degree is a mandatory requirement for the CCT then Study Leave time and finance can be considered as a contribution to the necessary costs.
- b) In practice, to achieve this support for a programme, the degree's curriculum must closely match a considerable proportion of the mandatory curriculum. Further, it will be necessary for the programme to objectively demonstrate that the acquisition of these competencies is most efficiently achieved by providing resources for the programme's Trainees to undertake the degree, rather than to achieve the same outcome by providing resources in support of more traditional opportunities in-programme.

Overseas Leave

Overseas courses/conferences will not be included on the list of pre-approved courses. Any money unspent within a trainee's study leave allowance can be used on an exceptional basis to support overseas courses and conferences with the approval of the TPD or Head of School. Guidance notes for the approval of overseas leave are given in Appendix D.

Meetings at which Trainees Present Papers

Trainees should be encouraged to present papers at academic and clinical meetings. The decision as to whether associated costs should come out of the study leave entitlement will depend on whether the meeting concerned is judged by the TPD or Head of School (the exception approver) as relevant to the curriculum and beneficial to the trainee's development.

Appeals process

- a) Applicants who wish to appeal against a decision relating to CSL should do so to the Head of Educator and School Development who will review appeals on an individual basis. All appeals must be in writing.
- b) An appeal against a Study Leave decision is purely a documentary process. The Head of Educator and School Development will only consider written evidence, when presented within six weeks of the decision being appealed against.
- c) Appeals must be addressed to:

Gerard O'Reilly
Head of Educator & School Development
Health Education England
1 Mere Way
Ruddington Fields Business Park
Ruddington
Nottingham NG11 6JS

Queries

Please address any queries to either your local Trust Study Leave Co-ordinator or to the CSL staff within the Educator and School Development Team at HEE-EM.

Contact details for Trust Study Leave Co-ordinators can be found on our website at <https://www.eastmidlandsdeanery.nhs.uk/page.php?id=737>.

Appendix A

Possible reasons why an application may not proceed as expected

1) The event does not appear on the approved list

On the application the trainee should select the option which says they want to apply for something which is not on the list. This will go through as an exception application. F1 trainees cannot apply for exceptions. F2 Trainees who want to apply for an exception should email contact the CSL staff at HEE-EM.

2) There is not sufficient money remaining in the budget

Leave Manager will only allow trainees to submit applications which do not exceed their remaining entitlement. Estimated expenses will need to be reduced so that they are within the remaining budget or else removed in order to submit the application.

3) There are not enough days remaining

Leave Manager will only allow trainees to submit applications which do not exceed their remaining entitlement. The remaining days must be in the correct category (internal/external) for the event. If there are no days remaining in the correct category the application cannot be submitted. If there are not enough days remaining the number of days being applied for will need to be reduced so that they are within the remaining entitlement.

4) Application is awaiting a decision

Trainees and relevant approvers will receive email notifications of the decision made at each stage of the approval process. If a trainee is waiting for longer than expected they should contact the relevant approver. If this does not resolve the issue please contact the CSL staff at HEE-EM.

5) The dates of the leave have already passed

Retrospective applications are not accepted so these applications cannot be made.

6) The user is not entitled to CSL

Non-trainees are not entitled to CSL and do not have Leave Manager access. Trainees are not entitled to CSL during the Period of Grace or if they go on OOPE, OOPC or OOPR. Trainees on OOPT are normally only entitled to CSL for this period if they are occupying a training post on a training programme in our region.

7) Post information is not up to date on Intrepid

Staff at HEE-EM need to update your record. Please contact us the CSL staff at HEE-EM who can ensure this is resolved.

If you are experiencing difficulties and none of the above apply please contact us.

Appendix B 2015/16 Entitlements

Core and Higher Trainees

| School | Higher Training | | | Core Training | | |
|--|-----------------|---------------|---|---------------|---------------|------------------------------------|
| | Internal Days | External Days | Budget | Internal Days | External Days | Budget |
| Anaesthetics | 20 | 10 | £500 | 20 | 10 | £500 |
| Dental | 20 | 10 | £500 | 7 | 23 | £325 |
| Emergency Medicine (includes all ACCS) | 15 | 15 | £500 | 15 | 15 | £500 |
| GP | N/A | N/A | N/A | Various | Various | Various |
| Medicine (all except specialties below) | 20 | 10 | £500 | 15 | 15 | £210 |
| Medicine: Acute (I) Medicine | 12 | 18 | £500 | N/A | N/A | N/A |
| Medicine: Allergy | 8 | 22 | £500 | N/A | N/A | N/A |
| Medicine: Cardiology | 6 | 24 | £500 | N/A | N/A | N/A |
| Medicine: Clinical Immunology | 10 | 20 | £500 | N/A | N/A | N/A |
| Medicine: Dermatology | 15 | 15 | £500 | N/A | N/A | N/A |
| Medicine: North only: Gastroenterology | 15 | 15 | £500 | N/A | N/A | N/A |
| Medicine: Genito-Urinary Med | 10 | 20 | £500 | N/A | N/A | N/A |
| Medicine: South only: Geriatric Medicine | 10 | 20 | £500 | N/A | N/A | N/A |
| Medicine: Neurology | 11 | 19 | £500 | N/A | N/A | N/A |
| Medicine: Palliative Medicine | 15 | 15 | £500 | N/A | N/A | N/A |
| Medicine: North only: Respiratory Medicine | 15 | 15 | £500 | N/A | N/A | N/A |
| Obstetrics and Gynaecology | 10 | 20 | £500 | 20 | 10 | £500 |
| Paediatrics | 20 | 10 | £500 | 20 | 10 | £500 |
| Pathology (all except Histopathology) | 20 | 10 | £500 | 20 | 10 | £500 |
| Pathology: Histopathology | 20 | 10 | ST3 £600 ST4 £700 ST5 £500 | 20 | 10 | ST1 £200 ST2 £500 |

| School | Higher Training | | | Core Training | | |
|-----------------------------------|-----------------|---------------|-----------------|-----------------------|-----------------------|--------------------------|
| | Internal Days | External Days | Budget | Internal Days | External Days | Budget |
| Public Health | 20 | 10 | £500* | N/A | N/A | N/A |
| Psychiatry (except Psychotherapy) | 20 | 10 | £500 | 0 (CT1+2) 20 (CT3) | 8 (CT1+2) 10 (CT3) | £0 (CT1+2) £300 (CT3) |
| Psychiatry: Psychotherapy | 20 | 10 | Ask for details | N/A | N/A | N/A |
| Radiology | 15 | 15 | £500 | 20 | 10 | £500 |
| Surgery (except OMFS) | 20 | 10 | £500 | 20 | 10 | £500 |
| Surgery: OMFS | 15 | 15 | £500 | 15 | 15 | £500 |

*Public Health – may be increased with Academic Board approval

Foundation Trainees

| Foundation School | Internal Days | External Days | Budget | Comments |
|-------------------|---------------|---------------|--------|---|
| Foundation Year 1 | 7 | 0 | £0 | Includes up to 5 for taster days, 1 Acute SIM and 1 Careers (Windmills) |
| Foundation Year 2 | 18# | 0 | £0 | Also applicable to Academic F2 |

#Less any taster days taken during F1 year

Maternity Leave

| | Internal Days | External Days | Budget | Comments |
|-------------------------------------|---------------|---------------|--------|------------------------------|
| Maternity Leave (except Foundation) | 0 | 10 | £170 | Calculated on pro rata basis |
| Maternity Leave (Foundation) | 10 | 0 | £0 | Calculated on pro rata basis |

Amendments:

16/11/2016 | Gerard O'Reilly | CMT entitlement corrected to £210 not £150

Appendix C

Authorised costs in addition to course fees

Rates quoted are those published in the NHS Terms and Conditions of Service which updated online from time to time.

| Allowance | Cost |
|---|--------|
| Overnight allowance (commercial – eg B&B/Hotel) | £55.00 |
| Overnight allowance (non-commercial – eg staying with friends) | £25.00 |
| Meals allowance (24 hours) | £20.00 |
| Meals allowance (lunch – more than five hours away from base, including the lunchtime period between 12.00-2.00 pm) | £5.00 |
| Meals allowance (evening meal – more than ten hours away from base and return after 7.00 pm) | £15.00 |

| Mileage (using the 'Reserve Rate' quoted in the NHS Terms and Conditions of Service – Table 7, Section 17 – in line with paragraph 17.19 of the same policy located here) | |
|--|--------------|
| All travel payable at a single rate | 28p per mile |

Amendments:

08/08/2016 | Gerard O'Reilly | Mileage rate corrected, now in line with guidance

Appendix D

Guidance to TPDs/Heads of School for approving overseas leave

- 1) Any money for overseas courses and conferences will be coming from the trainee's individual study leave budget. Funding for overseas courses should only be considered if the trainee will not need the funds to attend the necessary pre-approved courses.
- 2) Consider the added value of the course/conference over similar domestic courses. Is it the course that is attractive or the venue?
- 3) Would attendance at the course/conference benefit the trainee in line with their PDP?
- 4) Is the trainee participating in the course/conference, for example presenting a paper or poster?