

Guidance on approving discretionary leave, applications above threshold and international leave

NHS England Study leave supports all Postgraduate Doctors, Dentists, and other Learners ('applicants') on approved secondary care sector training programmes to achieve their curriculum outcomes, with the same principles applying to postgraduate doctors in primary care placements.

In line with the [Enhancing Junior Doctors' Working Lives](#) workstream, there is a commitment from NHS England to ensure that every applicant has the opportunity to gain all competences relevant to their level of training as defined in each curriculum. This means that activities that directly support acquisition of curriculum competences will be fully funded by NHS England and should be available on Leave Manager as a Standard activity, requiring no additional approval. These activities are listed by specialty on the approved courses list.

We also appreciate that some applicants may progress through their curricula at a faster rate. Therefore, discretionary or career enhancing activities which add value to the individual and support the wider NHS system can also be considered. These are 'discretionary' activities.

Therefore, NHS England will support these activities in principle; however, this also means that Discretionary activities (i.e., activities that support an applicant's overall career development or special interests) will need careful consideration as to whether they are appropriate to fund (either fully or partially). **For applicants in Secondary Care placements, there is no hard cap on study leave spend**; however, we need to ensure that the overall budget is spent appropriately and fairly across Programmes and Schools.

Each eligible applicant (excluding Dental, Public Health and Primary Care placements with separate budgetary arrangements) will have the budget on Leave Manager set to 'Unlimited', as there is no longer an individual cap on budgets. To monitor the overall spend and ensure fair use of public money within the region, for applications where the total estimated expenses exceed £1000 (the expense 'threshold'), the system will additionally require approval from the Head of School (HoS). These 'threshold' approvers will monitor and evaluate the range of funded educational activities undertaken by postgraduate doctors to ensure that it is fit for purpose, providing quality and value for money. As this is a new system, we will continue to monitor the effectiveness of this threshold for both supporting training and ensuring appropriate spend.

In addition to the £1000 'threshold' for approval of individual applications, to help ensure equitable access to funding across all Schools, if an applicant's planned annual spend exceeds £3000 the planned activities will be reviewed by Associate Postgraduate Dean (APD) for study leave: they may contact the TPD/HoS for clarification of the benefit.

All requests for study leave must be prospective: only in exceptional circumstances may the TPD/HoS can grant approval for retrospective requests.

The Leave Manager system offers applicants two options for submitting leave requests: Standard applications (for activities on the list of curriculum-related and educationally pre-approved events based on the applicant's training programme and grade at the time of the leave), and Exception requests.

Approval of these Exception requests is through the 'Exception' approver – the TPD or HOS for the programme as appropriate.

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What is an Exception approver?

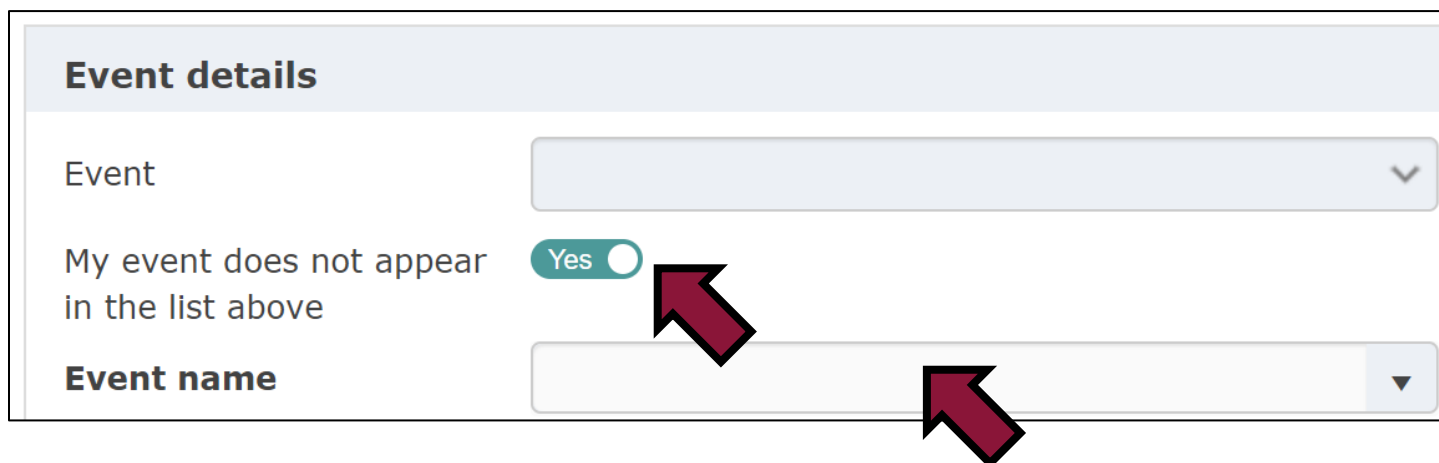
Exception approvers are a senior member of the School's faculty, usually the TPD or Head of School, whose responsibility is to ensure that the activity being applied for is appropriate for the applicant's specialty, grade, career trajectory and curriculum competences.

This guidance is designed to provide some initial support regarding the kinds of things to consider when reviewing an Exception application. If you're still unsure, or if you have any other queries, please contact the East Midlands study leave team at StudyLeave.EM@hee.nhs.uk, and we'll be happy to help.

Discretionary activities

Although NHS England has committed to supporting applicants achieving their curriculum competences by providing additional financial support through the study leave budget, we are aware that there are additional educational or professional development opportunities that enhance the knowledge, skills and attitudes of the applicants or enhance any aspect of patient care but are not mapped to any direct curriculum requirements. These are referred to as Discretionary activities.

Discretionary activities can support the overall progression of the applicant towards their career goals and should benefit training and/or the wider NHS. Applicants apply for both types of activities using the "My event does not appear in the list above" toggle and the **Event name** dropdown/free-text box on Accent:



Event details

Event

My event does not appear in the list above Yes

Event name

Such activities should be discussed between the applicant and their Educational Supervisor and included in the applicants PDP for the year. If this has been done, the activity is appropriate for the applicants stage of training/progression, and the costs/period of leave are appropriate, you can generally approve the request.

We would generally expect that Exception activities would not be supported if the applicant is not progressing satisfactorily, as their focus should be on attaining curriculum competences.

Additional guidance for Exception Approvers

Study leave funding is public money that is available to support the training and development of the future NHS workforce. There is therefore a requirement to obtain good value for money.

In general, all leave must fulfil the following

- The activity should meet the educational needs of the individual.
- It should be clear how educational activity will support the applicant to achieve their curriculum outcomes and how the activity will help the applicant to improve the care they are able to provide to patients. This may require a statement from the educational supervisor.
- The support required by each individual applicant to achieve their curriculum outcomes should be discussed and agreed by the applicant and their Educational Supervisor.
- The activity should be of a high quality and locally delivered where possible.

For Discretionary Study Leave, consideration should be given to the following:

- Applicant must be achieving curriculum competences at/above the expected rate in their programme. This only applies where the activity is genuinely aspirational (rather than helping to achieve curriculum competences)
- The activity is in line with their career trajectory and not a repeat of a similar activity (different learning objectives).
- Applicants' previous aspirational applications have been considered to promote fair use of study leave monies. **NOTE:** Attending exam preparation courses does not preclude discretionary activities but attainment of the exam should be the priority.
- The activity provides a skill/competence that is in demand at service level across the NHS or in the applicants intended place of work, e.g., point of care assessment.
- The applicant is on a standard outcome from their last ARCP, unless part of remedial action, or the issues have been resolved and attendance at the activity will not detract from essential curricula requirements.
- The approver must assess the educational benefit and value for money of the course. This requires consideration of the relative cost in comparison to other activities and the perceived benefit to the future NHS.
- The approver must be assured that the activity constitutes value for money and that regional or more cost-effective alternatives have been explored.
- The approver should only permit the minimum standard to achieve a capability and signpost applicants to appropriate activities.
- Preference should be given to activities within the region and applicants should be signposted by the educators to such providers.
- Popular activities should be managed through school budgets and considered for inclusion in the training programme.

Exam Courses

Exam preparation courses are often funded as a historically supported activity that provide clear benefits to applicants. Preparatory courses may provide better value than training extensions and therefore should continue to be supported and should not preclude access to other curriculum required courses or personal development opportunities.

Exam preparation courses may be provided locally as part of the general training programme and should be considered for inclusion in School Business Plans where possible. Such courses should be accessed ahead of private courses as they offer broad support and value for money.

The one funded course can be either face to face or virtual (including question banks). Where a course provider runs separate courses for different sections of a part of an exam, only one of these courses will usually be funded. Funding of courses for additional attempts at the exam will be considered in exceptional circumstances at the discretion of the Postgraduate Dean or nominated deputy.

What not to approve

Under the new arrangements, most activities that applicants request will be on the approved list or will require a straightforward review of whether the activity is appropriate for their programme, grade and career trajectory. However, there are a few activities that should not be approved for either leave or financing. These are included in the policy so applicants should be aware, but they are summarised below.

Mandatory training for potential future training programmes

As a rule, mandatory training (ALS, ATLS, NLS etc.) that is not required for an applicant's current training programme, but is required for a potential future training programme, should not be supported from the study leave budget. Exceptional cases may be considered, but please discuss these with the NHS England team first (StudyLeave.EM@hee.nhs.uk).

Academic research

If the applicant is on an academic programme, academic research that is additional to the acquisition of the relevant GMC approved clinical curriculum competencies should not be funded by the Study Leave budget, but through the funding source for the applicant's academic research; for example, via the University or NIHR.

Higher degrees

The study leave entitlement is not an appropriate source of time or funding for higher degrees (including Masters and PhDs), unless the degree is a specific and mandatory requirement for CCT. In these rare instances, please discuss with the study leave team (StudyLeave.EM@hee.nhs.uk).

Observerships/Clinical attachment

Study leave days/budgets may not be used towards observerships or clinical attachments.

Professional activities

Leave for Mandatory Teaching expected of the applicants employer such as ALS (where it is not also a curriculum requirement), Annual Leave, Interview Leave and Employer Related leave do not come under study leave and this leave should not be booked on Leave Manager.

Similarly, attendance at GP Selection Centre, Specialty Training or Consultant interviews is not Study Leave and this should not be applied for on Leave Manager. Applicants should seek advice from their Trust about applying for Professional Leave in these situations (local arrangements may apply).

Courses where an equivalent course is run and funded by NHS England

Where a course is offered by NHS England/a NHS England East Midlands school (such as Leadership & Management), funding will not generally be approved for the same/similar course delivered by an external provider. If the applicant is unable to attend the East Midlands course and

needs to have completed the course before the next East Midlands date, the applicant is expected to contact us regarding this.

Meetings at which applicants present papers/research

Applicants should be encouraged to present papers at academic and clinical meetings. The decision as to whether associated costs would be considered 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/or an aspirational activity that is beneficial to the applicants development.

International leave

International courses/conferences will not be included on the list of pre-approved courses unless attendance is a curriculum requirement. International study leave should occur when the learning outcomes from the event are not available in the UK. As part of the approvals process, requests to attend overseas study events will only be considered in very exceptional circumstances.

The event must provide a clearly stated curriculum outcome. Such circumstances include where the training course is not available in the UK, where the course or activity is part of the college curriculum or guidelines on required training, for the presentation of significant research findings from within an NIHR recognised academic clinical fellowship or clinical lectureship or where the course is set out as a mandatory requirement of college training to reach the required qualification to practice.

A full programme should be provided with the application on Leave Manager. A report recovering the entirety of the leave may be requested from the applicant after attendance. Any contribution to funding of such leave will need the prior written approval of the NHS England local Postgraduate Dean and should be requested specifically as 'International' leave on Accent Leave Manager. If further periods of international study leave are required this will be considered on a case-by-case basis by the Postgraduate Dean, and budget allowing. For approved international leave applications NHS England can support either the funding of the course/conference fee or travel and accommodation, whichever is the lower amount.

Given that best practice in many specialties is now shared at European and global meetings, the lack of ability to attend international events may hamper advancing of medical knowledge and service development. This may also have the unintended consequence of preventing quality improvement within the NHS.

One international event, providing all other curriculum requirements are met will be supported for each applicant for any one programme, which can be defined as Foundation, Core, Higher or run through.

For such activities, part-funding may be considered – reflecting both NHS England and the applicant's commitment to their enrichment. If an external body such as a Medical Royal College suggests a doctor in training attends an international conference. In such circumstances, NHS England expects that body to contribute at least 50% of the costs.

Relevant documents

[NHS England East Midlands Study Leave policy](#)

[Study Leave – An overview of the NHS England -wide approach](#)