

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. ∞

Following several queries from both educational supervisors and postgraduate doctors in training (PGDiT) this simple guidance note has been produced.

Each regional HEE study leave administrative office will have its own process on how to apply and reimburse for both approved and aspirational/discretionary leave-but they all will be similar in principle.

Entitlement

Study leave allowances are described in the NHS doctors and dentists in training Terms and Conditions (2016)	Days per annum
Grade	
Foundation Doctor Year 1	15 days
All other trainees	30 days

Types of Study Leave

Study leave is divided into two parts: Internal (**20 days**) and External (**10 days**)- with pro-rata LTFT allocation.

The local TPD can request a change to the ratio of internal to external leave, providing this applies to all PGDiT's at the same stage of the training programme. This is usually done annually in advance of the start of the academic year.

Internal

- 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 PGDiT's to do so. They are advised to check in each Trust as processes could be different around the region.
- b) Internal leave also includes internal events.
- c) PGDiT's should inform their TPD and/or Head of School should they feel that they are not receiving their entitlement of internal study leave.

External (including Private, Examination)

External leave is for events provided outside the region and/or programme. It also includes Private Study Leave and Exam Leave, as well as any Exception requests.

Private Leave

Private Study Leave can be taken for up to five days per year and should **only** be for exam preparation immediately prior to the exam. This comes out of the external allocation.

NOTE: Because Private leave is only used for personal exam preparation, expenses **cannot** be added to private leave requests. Requests for activities incurring costs must be submitted as Study leave requests, even when a day of study leave may not be required.

Examination Leave

- Examination leave can be given for examinations that are part of the structured training programme and necessary for the acquisition of a CCT.
- Examination leave can only be approved with pay and expenses (not including professional fees) within the United Kingdom.
- Subsistence and travelling expenses claims to and from the venue may be payable if set out in the original application and subsequently approved.
- Professional examination fees are never reimbursed

Overview

1. Study leave enables trainees to achieve their OM curriculum outcomes. Less than full time (LTFT) and academic trainees have equitable access to study leave funding.
2. Requests for study leave shall be viewed positively, but with regard to ensuring that the needs of OH service delivery can be safely met. This should not usually present a problem providing agreed notice is given to the NHS employer and requests do not clash with the leave of multiple colleagues.
3. Funding and time for statutory and mandatory training is an NHS employer responsibility and **does not** come from the study leave budget
4. Training placement providers retain the decision as to whether individuals may be released for study leave. It remains a requirement for individuals to get their study leave request approved by their Educational Supervisor or equivalent and additional approvers (e.g., Training Programme Director (TPD) or Head of School) dependent on local requirements.
5. The GMC accredited Educational Supervisor (or equivalent approver) plays a critical role as they determine, through discussion, the appropriateness of applications. It is an individualised approach, linked to OM curriculum requirements and the Personal Development Plan (PDP) of the individual:
 - The support required to achieve curriculum outcomes should be discussed and agreed by the individual and supervisor.
 - The activity should meet the educational needs of the individual.
 - It should be clear how educational activity will support achievement of OM curriculum outcomes and how the activity will help the individual to improve the care they are able to provide to patients or related activities

6. Study Leave and OOP

- Currently, the HEE position remains that individuals on OOP are **not** eligible for study leave time and funding, except for OOPT (Out of Programme Training). In exceptional circumstances and at the discretion of the Postgraduate Dean, study leave funding during other OOP types may be considered for curriculum-based activity
- Applications for individuals on OOPT will only be approved and funded where there is clear evidence linking the application to the specific curriculum requirement. Where you are uncertain, this will be at the discretion of the 'base' or local Postgraduate Dean

7. Study Leave within Period of Grace

Individuals within a Period of Grace are not eligible for funding from the HEE study budget as these funds are to be used for meeting Certificate of Completion of (Specialty) Training requirements. However, individuals can receive study leave time for ensuring revalidation requirements are met.

8. Study Leave and Statutory Leave

As described in clause 43 of the NHS doctors and dentists in training Terms and Conditions (2016): "Where a doctor takes parental leave their entitlement to study leave continues and this may be taken during 'keeping in touch' days or will otherwise accrue to be taken at a later date". The accrual of study leave will depend on the requirements of the curriculum for the individual's stage of training and to ensure the needs of service delivery can safely be met.

Study leave would not usually be permitted during periods of sick leave. It may be appropriate for trainees to access 'SuppoRTT' funding/opportunities in preparation for returning from prolonged periods away from training.

9. Study Leave and Exams

Exam fees are not funded through study leave. Travel and subsistence can usually be claimed from the study leave budget for sitting exams required within an individual's current curriculum.

Exam preparation courses i.e. **one course per exam** would usually be funded. Additional courses or activities (such as access to digital material) would be considered for funding in exceptional circumstances.

10. Professional and Generic Skills and Capabilities

Given the General Medical Council (GMC) requires all curricula to meet the standards set out in Promoting Excellence and contain the General Professional Capabilities (GPCs), this is now considered a core aspect of training.

Therefore, although each application should be considered on its own merit for that individual, study leave applications mapped to GPCs should usually be positively viewed as relevant to meeting a postgraduate doctor in training's curriculum requirements

11. Discretionary/aspirational leave principles must be judged on its own merit for the circumstances of the individual. However, typically, the following aspects would be considered when assessing the suitability of an application:

- Individual is achieving curriculum competences at/above the expected rate in their programme.
- The activity is truly in line with career trajectory and not a repeat of a similar activity (different learning objectives).
- Previous discretionary applications have been considered to promote fair use of study leave funding.
- The activity provides a skill/competence that is in demand at service level across the NHS or in the individual's intended place of work.
- The approver(s) 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(s) must be assured that regional or more cost-effective alternatives have been explored

12. Undertaking locum/agency work during study leave is tantamount to financial fraud.

What can study leave (time or expenses) not be used for?

Study Leave

- Leave for Mandatory Teaching expected of your employer (statutory and mandatory training)
 - Qualifications such as ALS/ATLS/APLS required for clinical practice by your employer unless they are **also** an explicit requirement for your current curriculum.
- Interview Leave, including GP Selection Centre, Specialty Training or Consultant interviews.
 - PGDiT's should seek advice from their Trust about applying for Professional Leave in these situations (local arrangements may apply).
- Ceremonies
- Employer-related leave
- Observerships/clinical attachments
- Higher Degrees, including PGCerts, Masters, and PhDs, not required for CCT
 - 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. These should normally be managed by the School through HEE's School Account Manager rather than claiming the funding as study leave; you should discuss this with your TPD and/or Head of School.
- - HEE funding of postgraduate diplomas and degrees must be rationalised by an established link to the curriculum and a commitment that the qualification will be integral to the doctor's future career.
 - 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 junior doctors to undertake the degree, rather than to achieve the same outcome by providing resources in support of more traditional opportunities in-programme.
- Meetings to present papers
 - PGDiT's 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 junior doctor's development.

Expenses

Inappropriate costs for study leave, which will not be funded, include:

- Retrospective applications.
- Examination fees.
- Membership/subscription fees.
- Credit card charges.
- Conventions.
- Ceremonies.
- Equipment, incl. books.
- Publication, abstract submission or printing costs.
- Visas or application fees.
- Any costs where evidence of payment cannot be provided (i.e. receipts/bank statements).
- Costs that do not relate to the period of study leave.

Appeals

The Postgraduate Dean in each HEE local base office is responsible for ensuring that study leave processes are implemented in a fair and transparent way in line with the principles in this document. Trainees can appeal against a study leave decision, the details of which can be found as part of the study leave section of HEE's website:

<https://www.hee.nhs.uk/our-work/doctors-training/study-budget-reforms>

∞ NON-NHS employers may have their own processes, but it may be helpful in particular on the 30 day per annum with pro rata limits and the balance of internal and external study leave definitions.

REFERENCES

<https://www.hee.nhs.uk/sites/default/files/documents/Health%20Education%20England%20%28HEE%29%20Study%20Leave%20-%20An%20overview%20of%20the%20HEE-wide%20approach.pdf>

https://www.eastmidlandsdeanery.nhs.uk/sites/default/files/hee-em_csl_policy_v2021-01.pdf