Study Leave Policy

Oxford Deanery

Approved by the Deanery Executive Team: September 2010

Review Date: September 2011
**Study Leave for Doctors**

The purpose of this policy is to ensure that doctors in training have access to a standardised system across the Deanery in which applications for study leave are considered on a fair, equitable and consistent basis.

All doctors, apart from those in their first foundation year, who are in educationally approved posts, are entitled to annual study leave. The educational approval for study leave rests with the Trust Directors of Medical Education (DMEs), working in collaboration with educational supervisors, training programme directors and the specialty schools whilst taking into account service needs within the Trust.

Applications for study leave should be made to the DME, with the approval of the Consultant Clinical or Educational Supervisor. Disputes between trainees and departments should be referred to the DME for resolution. If no agreement can be reached or if the dispute is with the DME, appeal to the Head of School and Dean may be appropriate.

**General Principles**

**General Principles for Study Leave in the Oxford Deanery**

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<th><strong>Management of Study Leave Funds</strong></th>
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<td>This is the responsibility of the DME. They can only effectively discharge this responsibility with support from Specialty Training Committees/ School Boards / Educational Supervisors. These funds should not be devolved further within the Trusts to Directorate / Departmental levels. The funds are allocated proportionately by the Deanery to each Trust, dependent on the number of eligible training posts.</td>
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<th><strong>Study Leave Year</strong></th>
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<td>This year (and its funding allocation) should be individualised to the trainee. It will commence on the day of appointment to an Oxford Deanery Programme and not relate to the fiscal year or calendar year.</td>
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<th><strong>Access to Annual Funding Allocation</strong></th>
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<td>Foundation and Core Trainees should access their funding allocation for the entire year even though they may be in an individual trust for only six months. The trainee is only eligible for a year’s funding in any one year and every application for funds must be accompanied by a record of the funding he/she has already received on the programme.</td>
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<th><strong>On-Call whilst on Study Leave</strong></th>
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<td>Trainees should not do on-call whilst on study leave, even if the period of study leave is short. Ideally this should include not being on call the night before study leave. Failure to adhere to this diminishes the value of study leave to the trainee and is poor value for money to the Deanery.</td>
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<th><strong>The Study Leave Week</strong></th>
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<td>The time allocation for study leave relates to the number of working days missed over the leave period. Weekends should only be counted when they coincide with a duty period.</td>
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<th><strong>Local Training Programme</strong></th>
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<td>The Oxford PGMDE Agreement allows for half the 30 days per year allowance for FY2, Core, STRs and SpRs to be taken up by local/Deanery training programmes provided that the teaching is in protected time and the programme is published in advance. It is good practice to</td>
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include the trainees in the planning of such a programme and to use a variety of teaching styles. It is the trainee’s responsibility to ensure that at least 60% of the training sessions are attended. These sessions should be given approval by DMEs for internal leave for FY2 and Core Trainees and by Schools and the PGD for SpRs/STRs.

Activities such as audit and Clinical Governance are part of a Trust’s normal activities and should not be counted against study leave.

**Private Study Leave**
This should only be granted for a defined purpose such as examination preparation, writing up research, review papers etc. DMEs should only grant such requests if there are written objectives agreed between the trainee and Educational Supervisor. It is good practice to subsequently evaluate the success / usefulness of this study leave. Aims and outcomes should be recorded in the trainee’s study leave record / portfolio. The general guidance (although exceptions can be made) is that maximum allocation should only be one week at a time. DMEs should devise systems to monitor that objectives are set.

**Locum Cover**
Study leave funding is allocated only for fees and expenses. Locum cover is not part of this. The need for locum cover should be minimised by good planning. Provided that adequate notice is given when study leave is agreed, the Trust/Department should ensure that cover is provided. Locum cover should be paid for by the Trust.

**Learning Agreements**
Study leave should not be granted unless a learning agreement has been submitted to the DME, who is encouraged to monitor the quality of these agreements and to ensure that study leave questions are addressed.

Unless in their first post, a ‘Personal Study Leave Account (PSLA)’ is also essential to the study leave application, showing courses, time and funding granted by previous employing Trusts. This is record is completed by the current employing trust, and is stored on the trainees’ computerised training and employment record (Intrepid).

**Booking**
At least six weeks’ notice should be provided by the trainee. Approval for study leave should only be given exceptionally if the notice period is shorter.

**Appeal Mechanisms**
Disputes between trainees and departments should be referred to the DME for resolution. If no agreement can be reached or if the dispute is with the DME, appeal to the Dean is the next step. All appeals require appropriate written documentation.

**Local courses**
All trainees should attend the relevant local course in preference to equivalent external courses.

**Funding for new courses:** Schools and STCs wishing to set up new courses can seek funding by top-slicing their trainees’ funding equally across the region, provided that the top-slicing is a relatively minor proportion of the total allocation, a majority of trainees consent and it does not unduly disadvantage trainees that need funding for other courses. **Trainees should sign a contract confirming attendance at the course.** This will be monitored by the Schools, and **non-attendance reported to DMEs.** Schools should keep exam success statistics and any other appropriate outcome measure to assure the Deanery and DMEs of quality.
Core Trainees and Foundation Year 2 Trainees (F2s)

Planning

Planning of study leave can be difficult because career paths may not have been finalised and training rotations are less formalised. However, planning should be as long-term as possible, especially when training rotations are well defined (e.g. GP VTS, surgical rotations).

Study leave planning should be incorporated in the educational agreement drawn up between the trainee and his / her Educational Supervisor. These plans should be revisited at each appraisal. DMEs should monitor these to ensure that such planning takes place.

Specialty specific recommendations for essential, desirable and low priority courses will be added to these pages as they are updated.

Attendance / Monitoring

Trainees should keep a record of their study leave as a ‘Personal Study Leave Account (PSLA). This should be kept in their learning portfolio, which they should continue throughout their postgraduate career. The Personal Study Leave Account should be given to their Educational Supervisor at each new attachment. The record will help to inform the learning agreement and future study leave planning. The record should discuss both the aims of the study leave and other learning goals and whether, and in what way, these aims were met.

Specialist Registrars (SpRs) / Specialty Registrars (STRs)

Planning

DMEs need to co-ordinate the approval of study leave, taking into account Education Committees’ recommendations. Essential, desirable and low priority courses will be defined by specific specialties. Study leave planning should take place within the context of the entire training programme and not just on an annual basis.

Individual trainee’s study leave programme will be reviewed at each RITA / ARCP assessment. This should ensure that there is adequate access to study leave, and also that planning for it is undertaken. Any issues arising as a result of the assessment should be communicated to the trainee and his/her local College Tutor. The College Tutor should ensure that the trainee’s Educational Supervisor is appraised of any problems and also the Clinical Tutor if relevant.

Attendance / Monitoring

All STRs (or SpRs) should maintain a learning portfolio, which will include a record of the trainee’s study leave. This record will cover the aims of the study leave, and an evaluation of how well these objectives were met. This learning portfolio will often form part of the STRs (or SpRs) College Training Record.
Post- CCT trainees will continue to be eligible for study leave. The nature of the study may of course be different from pre- CCT in this transition period to a consultant appointment. Post-CCT trainees should register with their College for CPD as soon as they have obtained their CCT.

**Special Requirements**

There are a number of specialties with expensive / time-consuming courses that are regarded as essential, for example; Psychotherapy. Other specialties also have a demand for expensive courses. Funding from the study leave budget will not normally cover these and support will need to be found from elsewhere.

**Flexible Trainees**

These have identical needs to those of full-time trainees. However, Specialty Education Committees and Clinical Tutors should be vigilant in ensuring access is the same as for full time trainees.

**Overseas Graduates**

Overseas graduates should have precisely the same opportunities as UK graduates. However, these trainees may be less familiar with the UK study leave system and therefore College / Clinical Tutors should be proactive when it appears such trainees are not making use of their study leave opportunities.

**Invitations to Present Papers Abroad**

COPMeD guidance states that 'attendance may be possible but costs are likely to be only partially met by the study leave budget'. Care must be exercised if pharmaceutical company sponsorship is provided. Advice about its appropriateness must be sought from the Clinical Tutor. Departments sending their trainees on such conferences should be prepared to find alternative sources of funding. Clinical Tutors may wish to seek the views of College Tutors / Regional Advisors on an individual basis.

**Evaluation**

Trainees should critically evaluate every episode of study leave in terms of its general quality and its value to them. Most importantly, such critical evaluation, particularly emphasising what the trainee learnt, should be part of a learning portfolio. Critiques will be monitored by Educational Supervisors and Clinical Tutors, and also through STCs via the RITA / ARCP system. As far as possible, trainees should be encouraged to look on these evaluations as beneficial to them rather than as bureaucracy.

*Adapted with permission AF Jefferis August 2010*