**Introduction.**

The purpose of this policy is to ensure that doctors and dentists in HETV funded training posts have access to a standardised process for study leave. All applications should be considered fairly, equitably and consistently.

The policy has been agreed by the Directors of Medical Education (DMEs) of all the Trusts, the Foundation School Director, the Heads of Schools, the Dental Dean and the Postgraduate Dean within HETV.

All doctors and dentists in educationally approved posts, apart from those in their first foundation year (FY1), may apply to their employer for study leave. (FY1 doctors may borrow 5 days of their FY2 study leave allowance for a taster week – see section “Foundation Year 2 Trainees (FY2s)”)

The Terms and Conditions of Service for Trainees allow up to 30 days per year of discretionary study leave.

Educational approval for study leave rests with the Trust DMEs collaborating 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 trainee’s Clinical or Educational Supervisor. In addition approval may be needed from the Clinical Director of the unit in which the trainee is working so that the clinical service is maintained.

Revised and updated July 2014

Richard Dodds and Tony Jefferis
General Principles for Study Leave in the HETV programmes

1. Study Leave Year
   The year’s study leave and its allocated funding should be tailored to the individual trainee. It will begin on the day of appointment to a programme and not relate to the fiscal or calendar year.

2. The Study Leave Week
   Time allocated 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.

3. Study Leave Funds
   These are managed by the DMEs, who can only undertake this responsibility effectively with support from Specialty Training Committee, School Boards and Educational Supervisors. These funds should not be devolved further within the Trusts to Directorate or Departmental levels.

   The funds are paid monthly by HETV to each Trust, the amount being proportional to their number of eligible training posts.

4. Access to Annual Funding
   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. Tracking this funding is the responsibility of the trainee and will be monitored on the “Intrepid Post Management System ®”.

   Foundation and Core Trainees may access their funding allocation for the entire year even though they may be in an individual trust for only six months.

   All trainees on HETV approved training programmes may apply for a £600 grant regardless of grade or specialty to support their study leave (except FY1; and DF1 who must attend their 30 day Deanery programme). In common with all grants at public expense, agreement is needed in advance and detailed receipts are required to support the eventual payment.

5. Planning
   Essential, desirable and low priority courses will be defined by individual specialties. Study leave planning should occur within the context of the entire training programme and not just on an annual basis. The aim is that there is adequate access to study leave and it is planned
Individual trainee’s study leave programme will be reviewed at each RITA / ARCP panel. Matters arising as a result of the assessment should be communicated to the trainee and his/her local Specialty Tutor if applicable. The Specialty Tutor should ensure that the trainee’s Educational Supervisor and DME is told of any problems.

6. Application Process

A fully completed application, with at least six weeks’ notice, should be submitted by the trainee to the study leave administrator in the Postgraduate Medical Education Centre, HETV or specialty training committee as appropriate. Approval for the leave from the trainee’s department is to be included as well as educational approval of the leave by their Educational/Clinical Supervisor. (There may be local variations in policy for leave approval that should be included in the departmental induction.) Approval for study leave will only be granted under exceptional circumstances if the notice period given is shorter than six weeks.

*Change to the following if Intrepid Online in all trusts:*-

*The trainee must apply for Study Leave through Intrepid Online (correct wording needed). The first approval from the departmental rota coordinator must be confirmed with at least 6 weeks notice. Educational approval is then necessary before going to the Postgraduate Centre Study Leave Administrator and/or DME.*

7. Local Training Programmes

Trainees should attend a relevant local course in preference to equivalent external courses.

The local and regional training programmes run in HE Thames Valley account for:-

- 15 days per year for FY2, DF2 and Dental Career Development posts
- 20 days for Specialty (inc. LAT, Core and GPVTS whilst in hospital).

The sessions should be given approval by DMEs for internal leave for FY2; DF2 and Core Medical and Dental Care Development Trainees and by Schools and HETV for SpRs/STRs provided this teaching is in protected time and the programme is published in advance.—It is the trainee’s responsibility to make sure they attend at least 70% of these sessions.

Trainees should sign a register confirming attendance at the training, which will be monitored by the schools, and persistent absence reported to DMEs.

Activities such as regular departmental teaching, audit and Clinical Governance are part of a Trust’s normal activities and are not counted against study leave.
8. **Funding for new courses**
Schools and Specialty Training Committees wishing to set up new courses can seek funding by “top-slicing” their trainees' funding equally throughout HE Thames Valley, provided that this involves a relatively minor proportion of the total allocation, a majority of trainees consent and it does not unduly disadvantage those that need funding for other courses.

9. **Private Study Leave**
This will only be granted for a defined purpose such as examination preparation (if the examination in question is necessary for career progression), writing up research, writing review papers etc. DMEs will only grant these requests if there are written objectives agreed between the trainee and their Educational Supervisor (ES). DMEs should devise systems to monitor that objectives are set. The ES must agree that the leave is reasonable and appropriate to the context of the trainee's overall training and that the service commitment can be covered. The final approval is with the DME.

The general guidance (although exceptions can be made) is that maximum allocation should be 5 days in any 6 month period.

It is good practice to evaluate the success and usefulness of this study leave with your Educational Supervisor. Aims and outcomes must be recorded in the trainee’s study leave record / portfolio.

10. **On-Call whilst on Study Leave**
Trainees must not do on-call whilst on study leave. This includes not being on call the night before study leave.

11. **Locum Cover**
Study leave funding is allocated for fees and expenses. It must not be used to cover locum costs. Locum should not be required to cover study leave but if so, the cost must be covered by the trust.

12. **Learning Agreements, Attendance and Monitoring**
Trainees should include a record of their study leave in their portfolio, which they will be expected to continue throughout their postgraduate career. This record will cover the aims of the study leave, an evaluation of how well these objectives were met, as well as informing the learning agreement and future study leave planning.

Study leave will not be granted unless the trainee and ES have signed a learning agreement and the trainee has completed all necessary mandatory training in the trust in which they work.
Unless in their first post, a 'Personal Study Leave Account (PSLA)' is essential to the study leave application, which shows courses, time and funding granted by the previous employer(s). This record is updated by the current employing trust, and stored on the trainees’ computerised training and employment record (Intrepid®)

The PSLA should be given to their Educational Supervisor at each new attachment.

13. 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.

14. Quality Indicators
Schools running local courses for examination preparation should keep exam success statistics and any other relevant outcome measure to assure the Deanery and DMEs of the quality of their programmes.

15. Special Requirements
There are a number of specialties with expensive and time-consuming courses that are regarded as essential. Funding from the study leave budget will not cover these and support will need to be found from elsewhere.

16. Trainees at the end of their training
Post-CCT trainees will continue to be eligible for study leave whilst on the training programme. The nature of the study will 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.

17. Less than Full Time Trainees
These have identical needs to those of full-time trainees and may apply for study leave pro-rata.

18. 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 STCs and DMEs should be proactive when it appears such trainees are not making use of their study leave opportunities.
19. **Invitations to Present Papers Abroad**

The Postgraduate Deans (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 DMEs. Departments sending their trainees on such conferences should be prepared to find alternative sources of funding.

20. **Trust and Speciality Requirements**

Individual trusts, other employers and the trainee’s specialty may have additional guidelines on the approval and allocation of Study Leave. It is recommended that trainees consult these as well as the HETV-Study Leave Policy when they start their posts.

21. **Disputes and Appeals**

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 written documentation.
Foundation Year 2 Trainees (FY2s)

Study Leave should be used to:

- Support the aims of the Foundation Programme
- Achieve the foundation outcomes
- Explore career opportunities and improve wider professional development

FY2s may take up to a maximum of 30 days annual study leave, 15 days of which should be used to undertake obligatory generic training and the formal foundation teaching programmes within the Local Education Provider. The remaining 15 days may be used for study activities outside the Local Education Provider, of these 10 days being available for “taster experiences” in chosen specialties. 5 days of this may be borrowed from FY2 allocation and taken during FYI year.

A maximum of 5 days of external study leave can be taken in each 4 or 6 month attachment. Study leave time may be granted for Foundation Trainees to sit national examinations but no funding is available for this purpose.

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 is taking place. Trainees are expected to attend 70% of locally provided training opportunities.
Dental Foundation Year 2 Trainees (DF2s) and Dental Career Development Trainees (CDPs)

Study Leave should be used to:

- Support the aims of the Foundation Programme
- Achieve the foundation outcomes
- Explore career opportunities and improve wider professional development

DF2s may take up to a maximum of 30 days annual study leave, 15 days of which should be used to attend the Deanery Study Programme which is organised by the DF2 Training Programme Director. 10 of the remaining days may be used for study activities outside the Local Education Provider, of these 5 days being available for “taster experiences” in chosen specialties. 5 additional days may be used to attend obligatory generic training within the Local Education Provider.

A maximum of 5 days of external study leave can be taken in each 6 month attachment. Study leave time may be granted for Foundation Trainees to sit national examinations but no funding is available for this purpose.

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 is taking place. Trainees are expected to attend 70% of locally provided (Deanery and Local Education Provider) training opportunities.
Core (CTs) and Specialty Registrars (STRs) / Specialist Registrars SpRs (including GPVTS when in their hospital posts)

Study Leave should:

- Enhance learning
- Provide career advancement (linked to curriculum requirements)
- Be planned as an integral part of a training programme
- Be incorporated in the educational agreement drawn up between the trainee and their Educational Supervisor
- Provide education and training not otherwise available in the workplace setting
- Include a majority component that is defined as essential for the specialty or programme, with a proportion remaining for tailoring to individual needs, where considered integral to the training programme.

Specialty trainees: are entitled to up to a maximum of 30 days Study Leave per year. This normally includes 20 days per annum for Locally Provided educational activity including obligatory training and the core or specialty curriculum teaching programmes. This includes external university programmes that dental specialty trainees attend as part of their programme.

This leaves 10 days for discretionary study leave each year adjusted proportionally for length of attachment. The trainee may apply for 5 days of private study leave in any 6 month period leading up to an examination that is necessary for career progression but this will only be considered prior to the first occasion that the trainee sits this examination.

The number of days will be entered on the trainee’s record on Intrepid® at source by the Deanery. This will make it clear and simple for each trust to allocate and monitor the discretionary study leave they control.

Updated by Richard Dodds and Tony Jefferis July 2014