This set of documents describes new national arrangements and how these will be managed in Thames Valley.
Accessing centralised study leave and study budgets – a guide for trainees

1. What is Study Leave?
Study leave is defined in the 2016 National T&Cs as leave that allows time, inside or outside of the workplace, for formal learning that meets the requirements of the curriculum and personalised training objectives. This will include regional educational events where the time is protected.

2. What is Study Budget?
Study budget is defined as funding to facilitate attendance at approved training events.

3. Why is the Study Budget changing?
Many trainees have experienced inconsistency and inequity when accessing the study budget which has led to frustration with the current system. The Study Budget changes are being made to address these concerns as part of Health Education England’s (HEE) initiative ‘Enhancing Junior Doctor Working Lives’.

At present funding for the Study Budget is included in the money (tariff fee) for trainee placements which is paid by HEE to NHS trusts. By removing the study budget from the tariff, HEE will be able to manage it centrally through its local offices (i.e. HEE Thames Valley); the aim of this change to improve study leave access nationally, enhancing the educational training available to trainees and funding support.

4. What are the benefits of the new process?
The new HEE-managed centralised process should make accessing study leave and study budgets a more transparent, equitable, and streamlined process for all trainees.

There is a clearer definition of how the study budget should be used to support individual professional development. This includes:

- Covering costs of educational courses/activities that support curriculum attainment
- Agreement that NHS Trusts will cover costs of all mandatory training required to fulfil the trainee’s clinical role which are not part of the specialty curriculum
- Guidance on what the study budget will not cover e.g. College examination fees
- Provision of discretionary funding for individualised training opportunities.

Centralised oversight will enable HEE to:

- better monitor the courses trainees are attending
- promote high educational standards for courses
- consider funding and implementing high quality local courses for the training initiatives in highest demand – reducing trainee costs and improving trainee access to these learning opportunities.

Currently the new process will not apply to trainees in Public Health, GP trainees in their GP placements or Dentistry. Trainees in these programmes should refer to their Head of School for guidance.
5. **Gold Guide 7th Edition 2018**¹
The Gold Guide states that access to study leave should form part of the educational contract between Postgraduate Deans and providers of postgraduate medical educational placements. It highlights the Postgraduate Deans responsibility to ensure less than full time (LTFT) trainees have equitable access to study leave. Doctors on maternity or paternity leave can access study leave and budget for training events.

The Gold Guide also encourages trainees on career breaks to keep up to date by attending educational events but stipulates that there is no entitlement to study budget for this.

6. **Terms and Conditions of Service for NHS Doctors and Dentists in Training (England) 2016**²

The terms and conditions related to study leave are covered in Schedule 9 and state the following:

1. Study leave must be used for the purpose for which it is granted.

2. Study leave includes but is not restricted to participation in:
   - Study (linked to a course or programme)
   - Research programmes
   - Teaching remote from the immediate workplace (e.g. faculty member/ALS instructor etc.)
   - Time off to sit an examination
   - Attending conferences for educational benefit
   - Rostered training events such as ‘Academic half days’, study days provided within Post-Graduate School education programmes

3. Attending NHS Trust statutory and mandatory training is not counted as study leave.

4. All requests for study leave will be properly considered by the employer. Any grant of study leave will be subject to the need to maintain NHS services (and, where the doctor is on an integrated academic pathway, academic responsibilities) and must be authorised by the employer.

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² Terms and Conditions of Service for NHS Doctors and Dentists in Training (England) 2016, Version 2, 30 March 2017
5. Study leave up to the limits described in Table 1 below will normally be granted flexibly and tailored to individual needs, in accordance with the requirements of the curriculum. Requests for study leave in excess of these limits should be considered fairly where circumstances indicate such requests to be reasonable, and may be granted by the employer provided that the needs of service delivery can be safely met.

6. **Table 1:** Study Leave allowance for trainees.

<table>
<thead>
<tr>
<th>Grade</th>
<th>Up to x days per annum</th>
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</thead>
<tbody>
<tr>
<td>Foundation Doctor Year 1 * F1 doctors may 'bring forward' five days from F2 to organise a taster placement in their intended core or specialty programme.</td>
<td>15 (normally all are used to deliver the F1 teaching programmes in Trusts)</td>
</tr>
<tr>
<td>All other Doctors in training</td>
<td>30 (normally 15 days are used up in the regular teaching and training provided through the local school programmes)</td>
</tr>
</tbody>
</table>

7. Study leave for Foundation Year 1 doctors will take the form of a regular scheduled teaching/training session as agreed locally. Study leave attendance at ILS and simulation are usually included in this.

8. Study leave for doctors at Foundation Year 2 will include periods of regular scheduled teaching/training sessions, and may also, with approval from the educational supervisor and service manager, include:
   - Undertaking an approved external course
   - Periods of sitting an examination for a higher qualification or attending a preparatory course.

9. Study leave for doctors in core and specialties will include periods of regular scheduled teaching/training sessions, and may also, with approval from the educational supervisor and service manager, include:
   - Undertaking an approved external course
   - Periods of sitting an examination for a higher qualification or attending a preparatory course.

10. For AFC’s and ACL any grant of study leave will be subject to:
    - the need to maintain NHS services, and for doctors on integrated academic pathways, academic responsibilities.
    - The study leave should be shared between clinical and academic components of the posts on a pro rata basis as closely as possible (eg for ACFs, 25% should be taken during the academic component of the placement and 75% during the clinical component.

11. A doctor on a contract of employment of less than 12 months’ duration is entitled to study leave on a pro rata basis.
12. Where a doctor working less than full time (LTFT) is required to undertake a specific training course required by the curriculum, which exceeds the pro rata entitlement to study leave, the employer will make arrangements for additional study leave to be taken, provided that this can be done while ensuring safe delivery of services. LTFT trainees will have the costs of events reimbursed at the same rate as full time trainees.

13. Where a doctor takes maternity 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.

14. LTFT and Academic Trainees will have equitable access to the study budget.

7. What are my responsibilities when planning study leave?

**Trainee**
- Discuss personal development plan and educational activities with Named Clinical supervisor (CS)/Educational Supervisor (ES) at start of training placement and note in your Personal Development Plan (PDP)
- Complete learning agreement with ES at your induction meeting
- Register with electronic system if available to submit study leave applications
- Obtain approval for time off the rota is obtained with at least 6 weeks’ notice AND
- Obtain approval from your Named CS / ES / departmental educational lead / College Tutor for educational activity as soon as the absence request has been approved. They will confirm that the proposed activity is appropriate for the stage of training you are at.
- Book the event
- Update Portfolio with evidence of attendance after event
- Submit expense claim to Postgraduate Centre / Education Centre manager in accordance with local timescale processes.
- Inform Postgraduate Centre if you do not attend an event for any reason (e.g. event cancelled, illness etc.)

**Educational Supervisor (or Named Clinical Supervisor if not working on same site as ES)**
- Discuss personal development and study leave plans with trainee
- Clarify appropriate courses/educational activities to support curriculum attainment
- Authorise study leave in timely manner (within 2 weeks of application receipt)

8. Accessing aspirational funding
Discretionary funding may be available to trainees for training events which add value to the individual and support the wider system, but are not ‘essential’ for
curriculum completion. If you plan to apply for aspirational funding, discuss early with your ES/TPD and make sure you have achieved your required curriculum and competencies to support your application.

9. **Appeals Process**
   If your application is not approved for educational reasons, this will be communicated to you in writing, normally by email. You may appeal on this ground only, not if leave cannot be granted for service capacity reasons, to be considered by TPD/Head of School within two weeks of the date you were notified leave had been refused.

<table>
<thead>
<tr>
<th>Study budgets DO cover</th>
<th>Study budgets DO NOT cover</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ Courses/education activities to support you achieving the curriculum</td>
<td></td>
</tr>
<tr>
<td>✓ Courses to help you prepare for postgraduate exams</td>
<td></td>
</tr>
<tr>
<td>✓ Discretionary courses that add value to you individually and support the wider system</td>
<td>✗ Royal College membership and Eportofolio fees</td>
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<tr>
<td></td>
<td>✗ Postgraduate exam fees</td>
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<tr>
<td></td>
<td>✗ Any statutory or mandatory training required to fulfil your clinical role (this should be provided by your NHS Trust)</td>
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</tbody>
</table>
How can I access study leave and funding?

Discuss study leave plans with your Educational Supervisor/Training Programme Director

Make sure you confirm the time off required for study leave with the rota co-ordinator in accordance with local timescale processes

Submit study leave application to your Educational Supervisor with confirmation that the time off has departmental approval and is compatible with your agreed personalised work schedule

Your Educational Supervisor will review the application against curriculum requirements, personalised work schedule and your personal development plan

Your application should be signed off and confirmed by the Educational Supervisor within accordance to local timescale processes

Once approved you can undertake your educational course - make sure you keep hold of receipts

Submit an expense claim to your employing NHS Trust in accordance with local processes and provide proof of attendance and receipts

The NHS Trust will approve expenses and reimburse you via payroll in your monthly pay

If your application is not approved, the Educational Supervisor will confirm this in writing and provide reasons for this decision

You may discuss future study leave plans with your Training Programme Director or Head of School
FAQs

I am ST5 in Radiology, have completed FRCR and achieved my required competencies. I would like to apply for funding to attend a quality improvement workshop – will the discretionary study budget cover this?
Yes – this is exactly the type of course which will add value to you individually and the wider system. Other examples are leadership/medical management courses, healthcare technology and innovation workshops, and scientific conferences. Discuss your plans early with your ES/TPD and apply.

I am a Core Medical Trainee and am preparing for MRCP PACES – will the study budget cover a revision course and the exam fee?
The study budget will cover a course to help you adequately revise and prepare for PACES but will not cover exam fees.

I am a CT1 trainee in Psychiatry and want to attend the RCPsych Electroconvulsive therapy team day - how do I know if this is aligned with the curriculum and will be covered by the study budget?
Any courses required to support you achieving the curriculum, are covered by the study budget. Discuss any courses/educational activities you would like to attend with your named CS/ES/TPD and they will be able, to advise and support your application if it is appropriate.

I am a FY2 trainee and about to start a rotation on the neonatal intensive care unit. As part of my rotation I am required to complete Neonatal Life Support – will the study budget cover this?
No –As an FY2 trainee this course is required for your service commitment and does not fall within your curriculum. The NHS Trust should provide funding for this training.

I am a LTFT ST4 trainee in Respiratory medicine and am concerned that I will not be able to access study leave in the same way full-time trainees do?
Please be reassured all trainees including LTFT and academic trainees will have access to study leave and the study budget in an equitable way.

Do I need to complete my Statutory and Mandatory training prior to obtaining study leave, or attending non Statutory and Mandatory events?
It is important that Statutory and Mandatory training is undertaken, however it is a matter for the Trust to decide if authorisation and attendance can be granted prior to the completion of the Mandatory or Statutory training.
Annex A

Guide to Travel and Subsistence Expenses incurred as part of approved Study Leave with Study Budget

This page contains information for doctors in post-graduate training posts on how to claim back their travel and/or subsistence expenditure incurred whilst participating in an approved study leave event.

Please read these notes carefully before booking travel or accommodation:

- **Original receipts** should accompany every claim form to verify the authenticity of all expenditure detailed upon it. Claims should be submitted no later than three months after the event. Any claims received after the deadline may not be paid.
- HEE TV expects travel to be on the date the event is scheduled if the venue is less than one hundred miles 'door to door' each way and will not pay accommodation costs if you chose to travel on different dates.

**Travel:**

You must use the most cost effective means possible. Health Education England - Thames Valley reserves the right to only reimburse the cost of the cheapest fare.

- **By Car:** Candidates will be paid at public transport rate of 28p per (or a subsequently revised mileage rate as described in schedule 17 of the T&C’s for doctors in training, last revised 2016). The shortest practicable route should be taken and car parking fees will be reimbursed on production of receipts.
- **By Rail:** Supersavers and standard class rail fares only. The most cost effective fare must be sought. If possible, doctors should purchase tickets in advance to ensure this. Receipts for rail travel must include the date of travel and the start and finish locations. Credit card receipts are not sufficient.
- **By Taxi:** Expenses will be reimbursed for short journeys only such as from the nearest train station to the venue. A receipt will be required.
- **By Air:** Reimbursement for the cost of a plane ticket must be agreed in writing by Health Education England - Thames Valley prior to the purchase of the ticket. Payment for travel by air must not exceed the total cost of travelling by public transport. Any requests for authorisation of travel by air should be sent to studyleave.tv@hee.nhs.uk
Overnight accommodation

- Requests for reimbursement of overnight accommodation costs will only be granted for candidates who are travelling from a base destination more than 100 miles from the venue.
- Accommodation costs to be covered by HEE TV will be limited to the duration of the event plus one night, either before or after the event dates, unless there is no feasible public transportation when one additional night’s costs will be met.
- Overnight costs will be reimbursed up to a maximum limit of £55.00 per night.

Subsistence

- For study leave confined to a single day, refreshments and meals are normally included in the event fee.
- In the case of a residential event
  - Evening Meal allowance of £15.00 per day.
  - ‘Gala’ dinners at additional expense are not covered by the Study Leave budget
- No payment will be made for alcoholic beverages under any circumstances.

Receipts

- Receipts must be provided for all expenses otherwise your claim will not be processed. Receipts should be attached individually to the expenses claim software used by your employing organisation.
- Doctors are advised to keep a copy of the form and receipts they submit in case of problem or a query with payment.