Study Leave

Wessex Deanery Guidance

Updated: November 2012; Revised March 2013 for factual correctness

Updated by: Felicity Sladen, Deputy Business Manager, Christine Hardwick, Centre Manager, Bournemouth

Next review: November 2015
1 Introduction

This document provides guidance to Wessex trainees of all grades on study leave and funding. It describes Wessex Deanery’s approach to the management of study leave.

Educational approval for study leave is carried out by Trust Directors of Medical Education (DMEs) for trainees employed in trusts and by Patch Associate Deans for GP trainees in practice. They work closely with educational supervisors, clinical and specialty tutors and programme directors also take account of trust service needs.

This document should be read alongside the study leave guidelines of the trainee’s current employing trust (for trainees employed by trusts). School and College guidelines and curricula regarding relevant courses and the COPMeD (Conference of Postgraduate Medical Education Deans) policy http://www.copmed.org.uk/page.php?page_id=8 should also be consulted.

Limited funding is available to support study leave. For trust employees, this is managed by Trust DMEs and their Education Centre Managers on behalf of the Dean and by Patch Associate Deans for GP trainees in practice. Decisions about study leave are at the discretion of the DMEs/Patch ADs.

2 Definitions

Study leave is a key part of learning and maintaining skills and competence for all branches of medicine. However, study leave should not be seen in isolation. It is part of the overall educational programme that includes clinical supervision, locally arranged teaching, audit, case conferences and journal clubs etc. Study leave is one component to training, whereby trainees request time away from work to attend educational activities.

The aims of study leave are to:

- enhance clinical education, training and learning
- support the curriculum
- provide a theoretical knowledge base
- form part of the appraisal process between the trainee and their educational supervisor

The Terms and Conditions of Service for Hospital Medical & Dental Staff state; “Professional or study leave is granted for postgraduate purposes approved by the employing authority, and includes study (usually, but not exclusively or necessarily, on a course), research, teaching, examining or taking examinations, visiting clinics and attending professional conferences”.
Attending study leave may involve paying fees. Trainees can request a contribution, or in some cases the whole fee. The extent of support will be based primarily on the how much the study leave contributes to the overall training plan and to the trainee’s explicit objectives. DMEs will also ensure equity between trainees and specialties. The financial allocation is not an entitlement but an allowance.

Some specialties publish lists of courses regarded as useful for that specialty. In this document, the terms “mandatory”, “compulsory” or “recommended” are used to describe courses.

**Mandatory** courses are generally a trust responsibility, those required to ensure the safe practice of employees.

**Compulsory** courses are those that must be completed in order to fulfil the curriculum for that specialty.

**Recommended** courses are those that would be beneficial for a trainee of that specialty to undertake, however they are not mandatory or compulsory.

Where courses are deemed “compulsory” there may be situations where trainees may exceed their funding allocation. It is hoped that trusts would prioritise such situations for any surplus at the end of the financial year.

There two components to study leave:

- the **time** granted to take study leave and
- the **funding** allocated to support it.

### 2.1 Time

The time allocation for study leave relates to the number of working days missed over the study leave period. Weekends should only be counted when they coincide with a duty period.

The study leave time allowance varies by grade and is described in full in section 3.

Any extra time required over and above the standard allocation is at the discretion of the DME and should be discussed with the trainee’s Education Supervisor and then the DME.

### 2.2 Funding

Funding may be agreed by the DME for study leave.

Funding is allocated for fees and expenses only (see section 6 for further detail). Locum cover is not a part of study leave funding in Wessex (see also 7.2 & 7.3). However good planning can reduce the need for locums but where this is necessary, organising it is a Trust responsibility.

Trainees should be aware that their individual study leave year may be different from
the financial year and must therefore be aware that funding is allocated by financial year i.e. April to March. It cannot be rolled-over into a new financial year.

The annual study leave budget is held by the Directors of Medical Education. Education Centre Managers usually manage this on behalf of the DMEs. The annual allowance for trainees varies year on year and may vary geographically. The Education Centre Manager or DME will be able to advise the current figure.

Where course fees exceed the annual allowance for trainees, it may be necessary for trainees to self-fund the balance.

3 Allowance by grade, employment type or circumstances

Study leave time allocation and funding varies by grade of training.

3.1 Foundation Trainees

3.1.1 Foundation Year 1 (F1) Trainees

Foundation FY1 trainees are not entitled to/eligible for study leave.

However a formal core training programme is provided on a weekly basis, usually within their local Education Centre covering topics relevant to foundation doctors. Trainees must be released to attend i.e. they must not be on duty and should give their pagers to someone else so that they can take part. This “protected” time is specifically allocated to support their learning needs as laid down by the GMC and in the foundation training curriculum.

F1 trainees may “borrow” up to 5 days of study leave from their F2 year to undertake a “taster session”, however funding to support this from the F2 year will not necessarily be available. F1 trainees should contact their local Education Centre should they wish to arrange a taster session during F1.

3.1.2 Foundation Year 2 (F2) Trainees

Time

F2 trainees are allocated 30 days study leave each year in line with the financial year (i.e. April to March). Of these 30 days, a minimum of 10 days are used for generic training, as outlined below. This must be organised so that essential services can be maintained.

The GMC have specified generic (standard) areas of professional competence relating to Good Medical Practice and to the curriculum. These competencies form some of the Foundation Programme’s main learning objectives. Foundation Year 2 doctors should use their study leave to support these learning objectives.
Therefore, at least ten days each year should be set aside to support a formal educational programme in generic professional training mapped to the curriculum and other aspects of F2 training which will:

- improve clinical education and training
- provide education and training not easily available in a clinical setting or locally.

Trainees should attend this dedicated, structured core educational programme and the sessions must be held in protected time during the normal working day. Trainees must not be bleeped during this time. F2 doctors must be released for attendance.

Attendance at external courses is with the agreement of the trainee’s Education Supervisor and DME and should be agreed before applying for the course.

Trainees may sit exams if they choose to, however the focus of the foundation years should be on the training programme. Study leave will not be granted to prepare for examinations but flexibility will be shown to allow study leave for sitting examinations should trainees choose to do so. Trainees who wish to submit a request for study leave to sit an exam should discuss this with their local Foundation Programme Director or Director of Medical Education.

Funding

Each trust is allocated an annual budget based on the number of approved F2 placements.

The funding allocation for Foundation doctors should be used to deliver the programme described above, by funding educational activities such as outside speakers, simulation programmes and administrative support for F2 programmes.

Any time and funding that is left should be used to support other parts of their foundation training, relating to specific objectives and competences:

- special interests
- taster programmes in diagnostic or other clinical areas
- explore other career pathways (including academic tasters) that are not available in the usual F2 placement

Study leave may be used for other activities that can be added to trainees’ portfolios.

The F2 doctor should agree with their Education Supervisor how they can best use their study leave to:

- support the aims of the programme
- achieve the foundation outcomes and competences they need
- explore career opportunities and improve their wider professional development
3.2 Specialist Registrars (SpRs) and Specialty Trainees (CTs and STs)

Time

Trainees may take up to 30 days study leave each year. The 30 days normally includes 15 days each year for in-house educational activities. The remaining 15 days for study leave can include:

- external training courses
- private study leave time (at the discretion of the ES/DME – see 4.3)
- e-learning
- examinations – preparation, private study; sitting exams is in addition to the time allowance
- attendance at specialty association meetings as a delegate or presenter

The study leave year is calculated from the date at which trainees start their appointment or rotation with their employing Trust.

Funding

Each year, the sum available to each eligible trainee is set by the Deanery. There may be some top-slicing to support specific training programmes and trainees will be informed of this at specialty induction.

In the case of exams, funding can be used for accommodation and travel only, not exam fees.

Some Schools have developed a list of compulsory and recommended courses for each grade within specialty programmes, which may be accredited through the Courses and Conferences Centre or externally.

3.3 GP Trainees

The three year training programme is designed to provide the education required for GP Trainees. As a result, study leave for any additional diplomas or qualifications will not normally be required.

A summary for hospital and practice-based posts is given below. For full information consult the Patch Associate Dean or see http://www.wessexdeanery.nhs.uk/gp__primary_care/resources_and_information.aspx#PSL and scroll down to “Study Leave and Hours of Work and Training”.

3.3.1 GP Trainees in hospital posts

The study leave allocation (time and funding) for GP Trainees in hospital posts is the same as specialty trainees. However, the GP trainee study leave allocation for each
hospital post (ST1/2) will be “top-sliced” by the Patch Associate Dean for local educational activities in agreement with the DME. This is used to deliver the local education programme which is regarded as “high priority” and attendance is important, subject to agreement with service provision in the hospital trust.

3.3.2 GP Trainees working in practices

The full amount of GP/ST1 & 2 (6 months) and the GPStR (ST3 12 months) study leave is held by the Patch Associate Dean and they will advise on local arrangements for application and use of study leave funding.

The structured external education leave is normally an additional minimum of 5 days in the 12 months ST3/GPStR post. Additional time for this may be granted for identified significant learning needs and will include time for professional leave.

Additional study leave requests must be agreed between the GPStR and their Trainer/Educational Supervisor according to local guidelines and approval by the Patch Associate Dean or their approved deputy (i.e. Programme Director).

Trainer-approved additional study needs to be supervised by the trainers, and may include:

- Visits to other agencies (time with district nurse, social worker etc)
- Visits to OPD clinics and hospital Trusts for learning opportunities
- Visits to observe and undertake supervised work in other GP surgeries
- CPD events
- Other courses (see earlier)
- Study at home
- Optional additional day-release course activities

3.4 Fixed Term Specialty Training Appointments (FTSTA)

Trainees in FTSTA posts exceeding three months are entitled to study leave on a pro-rata basis.

3.5 Locum Appointments for Training (LAT)

Trainees in LAT posts exceeding three months are entitled to study leave on a pro-rata basis.

3.6 Locum Appointments for Service (LAS)

Trainees in LAS posts should be considered for study leave only if their post is intended to develop their career. Any LAS post that lasts for less than three months is considered unlikely to be suitable for purposes of career development. If study leave is sought, the educational supervisor and training programme director should clarify how the placement is to contribute to career development.
3.7 Academic Clinical Fellows and Academic Clinical Lecturer posts

All ACF & ACL posts are entitled as per specialty trainees. However trainees are also entitled to apply for bursaries to support their academic programme through the relevant Dean of the Medical School.

3.8 Less Than Full Time (LTFT) (all grades)

All LTFT trainees have access to study leave funding on the same basis as full-time trainees. Study leave time is on a pro-rata basis.

3.9 Trainees on Sick Leave

Trainees who are absent from work on sick leave are not usually eligible for study leave unless there are exceptional circumstances.

3.10 Maternity/Paternity/Adoption Leave

Trainees may attend study leave activities such as training courses, if they wish, within their allowance, whilst on maternity/paternity/adoption leave and may take study leave and expenses, within their allowance, during their maternity/paternity/adoption leave period. This is a matter of personal preference for the trainee and there is no obligation for them to attend study leave activities during this leave.

Upon return to work after maternity/paternity/adoption leave ends, trainees can use their accrued study leave and expenses, applying through the normal approval process. However, trainees should discuss with their educational/clinical supervisor about balancing patient care/maintaining a clinical service with time taken to undertake study leave. This may require negotiation about the period within which such study leave must be taken. Supervisors should take a flexible approach in relation to this issue and consider each case on its merits.

It is recognised that trusts may potentially incur additional study leave costs where a trainee remains employed for the purposes of maternity/paternity/adoption leave yet their post is filled by another trainee who has rotated into that post. These costs should be managed within the overall study leave allocation for the trust. Year-end positions for each trust will be monitored by the Deanery.

3.11 Military Trainees

Military trainees applying for study leave time should seek authorisation from the Director of Medical Education at the trust where they are working however they should pay for courses directly or seek reimbursement via the Tri-services Deanery, following their approval processes also.

4 Exclusions
4.1 Induction and Mandatory Training

Study leave excludes learning and skills development required for clinical governance purposes, including induction and mandatory training. This is provided by the trainee’s employer.

4.2 Audit

Study leave excludes audit. This is considered part of the Trust’s normal activities.

4.3 Private Study Leave

Granting of approval for private study leave for exam preparation or private study is at the discretion of the DME and is not automatically granted. The aims and objectives of home-based revision should serve a specific, defined purpose and be discussed and agreed between the trainee and their educational supervisor. A “private study leave plan” with learning objectives, should be sent to the DME after it has been agreed with the educational supervisor.

F2 trainees will not be granted private study leave for examination preparation. Priority for foundation trainees is seen as the training programme.

Private study leave should be no more than one week at a time.

4.4 Higher Degrees

A higher degree may be an appropriate use of study leave and should be discussed with the Director of Medical Education and educational supervisor. Course costs will often exceed the annual study leave allocation so any funding available will be at the discretion of the DME.

However, the Deanery does run a separate bursary scheme annually, to which trainees can apply for funding. Details can be found on the Deanery website http://www.wessexdeanery.nhs.uk/about_wessex_deanery/resources_and_information/education_bursary_scheme.aspx.

4.5 Examinations

For Foundation Y2 Trainees the main focus should be the training programme although FY2 trainees may sit examinations should they wish to. Study leave will not be granted to prepare for examinations but flexibility will be shown to allow study leave time for sitting examinations should trainees choose to do so. Trainees who wish to submit a request for study leave to sit an exam should discuss this with their local Foundation Programme Director or Director of Medical Education.

For other grades, trainees may apply to use study leave for exam preparation and private study. Note that sitting exams is in addition to the time allowance.

In all cases, funding can be used for accommodation and travel only, not for exam
fees. Only two attempts at the same examination will be eligible for study leave except with the specific prior agreement from the trainee’s educational supervisor.

4.6 Courses

Study leave will not normally be granted to attend the same course a second or subsequent time.

5 The Courses and Conferences Centre

A range of clinical, revision and leadership courses are provided through The Courses and Conferences Centre. These support the learning & development of medical trainees for the Wessex Deanery. Details of the courses can be found at http://www.wessexdeanery.nhs.uk/courses__conferences_centre.aspx.

Courses are available at either nil or minimal cost to Wessex trainees. They are pre-paid by the Dean and so make a major contribution to ensuring study leave allocations can be used to the full. All courses are fully evaluated to make sure they continue to fulfil the relevant training curricula and trainees attending will be expected to complete an evaluation.

Please note that the cost of courses provided externally can vary considerably. Trainees wishing to attend external courses should be able to demonstrate that these courses are not available within the Courses and Conferences Centre and that they are part of their Appraisal and Learning Agreement before applying. Not all courses that trainees wish to attend will be agreed.

6 Approval of study leave and expenses

Responsibility for the study leave budget and approval of study leave rests with the Director of Medical Education. Local systems may vary however study leave applications should be made to the Director of Medical Education/Education Centre Manager at the trainee’s employing trust, using that Trust’s application form/process. For GP trainees the patch Associate Dean of GP Training will advise on the application process. All applications for study leave should be prior-approved according to the local process, whether applying for time off, funding or both.

All study leave requests should be submitted at least 6 weeks before the course starts though local variation may apply. Please note, applications made later than this, or after the course, may not be paid. This will be at the discretion of the DME. Retrospective payment of any study leave is not a right.

Approval of study leave is based on the following criteria:

- that the trainee can be released from their normal place of work to attend
that the study leave is relevant to the trainee’s educational needs, appropriate to their experience and supports their training programme and planned career path

that the trainee has enough study leave time left

that the trainee has enough study leave funding left to cover the costs of the activity OR the trainee has agreed to self-fund on their application form

that a learning agreement has been submitted to support the request. Evidence may be requested.

that the trainee has attended induction in their local employing trust. Failure to attend induction may result in the study leave allowance being withheld.

The following will be considered for approval:

- Approved registration and/or course fees. Where course fees exceed the individual annual study leave allocation, part-funding only, may be available. Trainees may need to self-fund the balance.

- Travel expenses if no course is available locally, specifically: standard class train and coach fares, economy internal (UK) air fares if appropriate. Any claims for flight costs should be agreed in advance with the DME. See the “Terms and Conditions of Service Handbook” for information about subsistence allowances and mileage for cars, passengers and pedal cycles. It is recognised that some training locations may incur greater study leave travel costs than others. These should be managed within the overall study leave allocation for the trust. Year end positions for each trust will be monitored by the Deanery.

- Approved expenses will only be reimbursed following attendance at the educational activity, with appropriate, original receipts.

- Study leave will only be granted in exceptional circumstances for overseas courses or conferences. In these circumstances, trainees may claim return travel expenses to the point of exit from the UK, and will only be funded to the amount of the trainee’s current study leave budget.

- Study leave will not normally be granted to attend the same course more than once or an examination more than twice, except with specific prior agreement from the trainee’s educational supervisor.

- Funding is allocated to trusts on the basis of the number of medical postgraduate education training (MPET) posts. If a trainee rotates from one trust to another during the financial year but has not used their allocation, this cannot be transferred from one trust to another.

7 Responsibilities
7.1 Wessex Deanery

The Deanery will provide the following support for the study leave process:

- an agreed deanery study leave guidance (this document)
- an annual study leave allowance as agreed with our funding authority/ies and allocated on the basis of the number of MPET funded posts. This may vary from year to year and geographically and is paid to employing trusts/local education providers (LEPs).
- hear appeals where these cannot be resolved at trust level or via the Head of School.
- The Deanery will monitor study leave expenditure and applications from time to time, via the Intrepid database system.

7.2 Employing Trusts/Local Education Providers

- The management of study leave funds is the responsibility of the DME supported by the Education Centre Manager, Specialty Training Educational Supervisors and GP Patch Associate Deans.
- Trainees should arrange with their employing trust, not to do on-call while on study leave, even if the period of study leave is short. This includes being on call the night before study leave. Failure to do this diminishes the value of study leave to the trainee. Achieving this may involve swapping nights on-call with colleagues however, adequate notice of study leave should keep the need for locums at an absolute minimum e.g. when leave has already been approved but the nights suddenly change. In the event that locum cover is needed to cover agreed study leave and where it has not been possible to find an alternative solution, the trust will arrange that cover and it will be paid for by the trust.
- Trusts will confirm that suitable arrangements to cover leave have been made and other requirements, such as induction and mandatory training, have been undertaken.
- DMEs will monitor the quality of learning agreements submitted to them by trainees who have requested study leave.
- The DME will attempt to resolve disputes between trainees and departments.
- All trainees’ training records will be linked through the Deanery database system (Intrepid). All trust education departments have access to this record as it relates to their trainees.

7.3 Trainees

- Trainees should ensure they attend at least 70% of the locally provided training sessions and the trust induction programme.
- Trainees must submit a learning agreement to their DME with their study leave application. Study leave must be relevant to the trainee’s educational needs, appropriate to their experience and support their training programme and planned career path.
• The trainee must provide at least six week’s notice of when he/she wishes to take study leave to their employer/LEP. Study leave will only be approved exceptionally if the notice period is shorter or after the event.
• Trainees should arrange with their employing trust, not to do on-call while on study leave, even if the period of study leave is short. This includes being on call the night before study leave. Failure to do this diminishes the value of study leave to the trainee. Achieving this may involve swapping nights on-call with colleagues however, adequate notice of study leave should keep the need for locums at an absolute minimum e.g. when leave has already been approved but the nights suddenly change. In the event that locum cover is needed to cover agreed study leave and where it has not been possible to find an alternative solution, the trust will arrange that cover and it will be paid for by the trust.
• Trainees must ensure that appropriate approval has been obtained before taking study leave. Unofficial absence from duty is regarded by trusts as a breach of contract and may lead to disciplinary action.
• Taking other paid employment during any period of study leave will be considered a disciplinary offence.
• Wherever possible trainees should attend courses near to their training base and within Wessex before requesting external courses.
• A trainee seeking study leave funding for training will be expected to have shown commitment and participated in other educational opportunities within their training programme before applying for study leave.
• Trainees should not register or pay for any course or examination before obtaining approval for it. Repayments in these circumstances are not guaranteed.
• Trainees must ensure that one study leave form is completed for each course, or episode of leave; multiple claims on one form will not be processed.
• Trainees must provide a course description including content, previous course evaluation (if available) and overall costing with their application.
• Trainees should choose from a list of courses maintained by their school, where available. Other applications will be considered on merit.
• Trainees should complete any evaluation required by the course provider. For the Courses and Conferences Centre courses, this is mandatory.
• Trainees should make a reflective statement about the course in their portfolio following attendance at any course.

Failure to meet these requirements may result in study leave being withheld.

8 Appeals

The DME will attempt to resolve disputes between trainees and departments. If no agreement can be reached, or if the dispute is with the DME, any Wessex trainee has the right of appeal to their Head of School in the first instance and ultimately the Postgraduate Dean. Appeals to the Postgraduate Dean should be in writing in accordance with the Deanery Appeals Policy. The decision of the Postgraduate Dean, in any case, will be final.