Guide to Managing Study Leave

<table>
<thead>
<tr>
<th>Process</th>
<th>Understanding the Study Leave Allocations</th>
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<tbody>
<tr>
<td>Timescale</td>
<td>At the start of a rotation or when a Trainee starts in a Trust</td>
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<tr>
<td>Role</td>
<td>Study Leave Administrator in Trust Education Centre</td>
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Why does this have to be recorded by Trusts?

The Deanery receives from the SHA a sum of money per trainee to cover their study leave in the form of 15 days and approximately £600. The Deanery has to report on how this money is used by Trust. Although the Deanery has to provide reporting data on financial year (April to April) it is accepted that Trust users will work on the training year (August to August). The Intrepid Study leave module will accommodate both reporting periods and provides a streamlined, standardized record management system with management reports to reflect input.

How should internal and external study leave be managed?

There are two types of Study leave which are broken down as follows:-

<table>
<thead>
<tr>
<th>Type</th>
<th>Funding</th>
<th>No. of days</th>
<th>Example</th>
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<tbody>
<tr>
<td>Internal Study leave</td>
<td>Trust</td>
<td>15</td>
<td>5 days private pre examination days, mandatory training including health and safety, Equality and Diversity, manual handling</td>
</tr>
<tr>
<td>External Study leave</td>
<td>Deanery</td>
<td>15</td>
<td>Any professional courses linked to training, presenting at seminars or conferences beneficial to training</td>
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A course taken within the Trust will still be external if it falls into the above category.

What figures (days and budget) are allocated to Intrepid?

Allocation of Days allowed pro-rata

The aim is that all study leave is recorded and managed on Intrepid and additional spreadsheets are not used. Therefore, rather than record internal and external separately a total of 30 days can be allocated pro rata.

Please note that it is important to be aware that a trainee must not exceed 15 external study days and all users need to be aware of this.
Allocation of budget allowed pro-rata

Although a trainee can have 30 days allocated to their training record pro-rata, the budget is only available to cover external training which is associated to the Deanery external training budget. Therefore, the allowance will be approx. £600. If there is an occasion where more money can be allocated per trainee this can be added, but it must be added to the ‘brought forward’ field and not added to the standard budget.

From the Home page click on ‘Staff List’ and then ‘Search’ for the trainee that needs to have leave allocated to the record.

**Process**

Adding Study leave day entitlement and financial budget for the year

Click on Entitlements (Leave) along the middle of the trainees ‘Staff List’ training record. Many financial years will be visible and both past, present and future can be used. Click on relevant financial year ensuring that the ‘Type’ is correct i.e. not Annual leave.

Please note that there is not a set way to record a trainee’s allocation as long as there is not a break in dates. For example, if a trainee is in a Trust for 3 months then the data will be recorded pro-rata. In the next Trust they will do the same ensuring that the dates follow on. Alternatively a trainee could be in a Trust for a year in which case the full 12 month entitlement would be recorded.
Entitlement Days Allocation – top data group

When double clicking on the financial year the following days entitlement data needs to be completed for the year:-

- Leave year
- Start date and end date
- Brought forward*
- Entitlement
- Lieu days*

*It is accepted that in many cases these fields are not completed as they are not relevant

All will be calculated and show in blue on the right hand side. All blue data is read only and cannot be amended using this tab. Once this entitlement has been set up for the year/pro-rota it does not need to be amended.
Entitlement Budget Allocation – lower data group

When double clicking on the financial year the following study leave budget data needs to be completed for the year:

- Financial year
- Start date and end date
- Brought forward*
- Budget

*It is accepted that in many cases this field is not completed as it is not relevant

As with the number of days the running total is shown in blue and is ‘read only’ and will not need to be amended again once the budget has been added for the period of time i.e. annual or pro-rata
Using the ‘search’ option within the ‘staff post’ list find the relevant trainee’s record and click on the ‘Education/Leave’ tab. It is across the middle of the trainee’s record.

The following fields will need to be completed:

**Mandatory Dataset**

**Leave type** – Always Study

**Date from** – the actual start date

**Date to** – the actual end date of the leave

**No of days** – Days actually taken from allocation (i.e based around shifts and rota etc)

**Date applied for** – date trainee applies

**Date approved** – date approved on form

**Authorised** - Yes

**Course** - Course trainee attended

**Venue** – this is for mileage claims

**Internal/external** – Select relevant option

**Reference** – If there is a chance that trainees in a Trust may exceed the 15 external days please put ‘E’ for or ‘I’ for internal.
Click on ‘Add new cost’ and a blank box will appear for completion. This may be completed at times as the claim is passed for payment.

Mandatory dataset

Expense Type – Fees, mileage etc. For each associated cost set up a new ‘Leave Cost’.

Financial Year – By default this will be the current year. If an application is being added for a past or future year amend accordingly.

Authorised – Tick if authorised.

Estimated cost – This is what the claim is expected to be but not necessarily paid out.

Claim Amount – This is the claim amount that the trainee has applied for.

Actual Cost – By default this is populated by the ‘Claim Amount’. If what is actually paid is different it can be overtyped and this will be reflected in the budget.

‘Reference’ and ‘Comments’ are not mandatory but can be used by the trust to provide additional information. For example, where a mileage is added it may be useful to date the comment and add information on distance and price per mile.
Creating a report

From the ‘home page’ click on ‘Report Menu’ and reports relating to Study Leave are in the second column.

Report to show estimated and actual budget and days claimed over a period of time

The report titles ‘Leave’ shows all Study Leave applied for over a period broken down by estimated and actual with totals.

Using the filters,, select which trainees need to be included in the report.  Suggested filters include Trust, Training Grade, Post, and Specialty 1. Alternatively an individual or group of individuals can be selected

‘Date from’ and ‘Date to’ need to be selected to cover the reporting period and Study leave must always be ticked.

Previewing and printing a report

To view the report click on ‘Preview’ and to print it click on ‘Print’.

The Preview will show the report in ‘Word’ format and will be in alphabetical order by trainee surname.  To view the report in Excel, click on ‘Output’ and then select ‘Microsoft Excel 97 – 2002’.  Click on ‘OK’ and then select the file you want to save the document into.
The report titled ‘Individual Summary’ shows all Study Leave applied for over a period with individuals name, GMC, Grade, current specialty, Study leave record and post history. One page per trainee.

Using the filters, select which trainees need to be included in the report. This can be an individual or a group for which an individual summary will be produced with a new page per trainee. Suggested filters include Trust, Training Grade, Post, and Specialty. Alternatively an individual or group of individuals can be selected.

‘Date from’ and ‘Date to’ need to be selected to cover the reporting period and Study leave must always be ticked. The other boxes are ticked by default and should usually remain active.

To view the report click on ‘Preview’ and to print it click on ‘Print’.

The Preview will show the report in ‘Word’ format and will be in alphabetical order by trainee surname. To view the report in Excel, click on ‘Output’ and then select ‘Microsoft Excel 97 – 2002’. Click on ‘OK’ and then select the file you want to save the document into.

Quality Impact Assessment

This process has been reviewed in line with Deanery policy.
Training Guide Verification

<table>
<thead>
<tr>
<th>Reviewed by</th>
<th>Dawn Day and Hayley Strange</th>
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<tr>
<td>Date</td>
<td>16/09/2011</td>
</tr>
<tr>
<td>Tested by</td>
<td>Royal Berkshire Trust and Milton Keynes Hospital Trust</td>
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<tr>
<td>Date</td>
<td>September 2011</td>
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