Introduction

This guidance document replaces all previous documentation and policies related to study leave for junior doctors and dentists in training and is effective immediately. The arrangements for dentistry may vary and therefore dental trainees are advised to contact the local Postgraduate Dental Dean or their Dental Training Programme Director in the first instance.

Access to education and training away from the workplace is an integral part of the Personal Development Programme for all trainees, supporting achievement of the learning outcomes specified in specialty and generic curricula. Educational events and opportunities (including web based learning, clinical skills and simulator training) are available both locally and regionally. Doctors and dentists in training are encouraged to utilise these opportunities which are supported by Educational and Clinical Supervisors, Training Programme Directors and Heads of Schools. All educational and training requests should meet the requirements detailed within Dental, Foundation or Specialty College Curricular. The Deanery also recognises that, in some specialties, trainees will need to access specialised training events and opportunities that are arranged outside the Deanery.

All trainees must follow the local Trust application process for formal authorisation when making all applications to access education and training events occur outside the workplace. This will involve downloading a standardised form from the Deanery Website. The administrative arrangements within the Trust or GP Surgery may vary, so it is important to obtain this information early on in each rotation – it should be given during Induction, and is always available through the Trust based Medical and Dental Education Centre or GP Surgery Practice Manager.

This Handbook provides guidance in accordance with current advice and information from the Department of Health, Whitley Council Rules, the Conference of Postgraduate Medical Committee Deans (CoPMED) and the Postgraduate Dental Deans (COPDEND) who have set out the processes to be used when considering applications for study time and professional leave.

This document is a reference guide and should be referred to, throughout training. Updates and revisions will be issued from time to time and will be available on the Deanery website www.yorksandhumberdeanery.nhs.uk.

Budget Availability
Funding is identified annually through recommendations from each Deanery Foundation and Specialty School. Annual priorities are agreed by the Postgraduate Medical and Dental Education Committee (PGMDE).

Governance and Appeals
The Deanery will use the Postgraduate Medical and Dental Education Committee (PGMDE) and its subgroups to govern the arrangements and funding for postgraduate medical and dental education and training. The responsibilities and membership are available on the
Deanery website.

Appeals will be managed within the Trust and School. In the case of dental training, appeals will be dealt with by the dental section of the deanery, in the first instance. Details of the process are included at the end of this document.

Training Support Infrastructure
All trainees are required to have a named Educational Supervisor with whom they should meet to discuss and plan personal development and access to education and training. Each trainee should produce a Personal Development Plan (PDP). Meetings should be documented and take place at the beginning, middle (usually) and end of each placement. Additional support is available from Clinical Supervisors, Training Programme Directors, Heads of Schools and Directors of Postgraduate Medical and Dental Education (DME). It is not expected that trainees that are off work, on sick leave or maternity leave would apply for leave, however, if applications are related to a planned ‘return to work’ or ‘keep in touch’, these details should be clearly marked on applications, which should be submitted as described below.

Planning and making an application
All applications must be made on the standardised Deanery application form that is downloadable from the Deanery website. All application forms should contain estimated costs of travel, subsistence, accommodation etc. Once completed, this form (in hard copy) must be signed by the appropriate Designated Signatory. All applications will be considered by the Training Programme Director or deputy. Applications for leave must be submitted at least 6 weeks before the date of the leave. Details of leave taken must also be recorded within the training portfolio.

It is important that other Trust colleagues (particularly the Rota Organiser) are involved in requests for leave, to ensure that service commitments are appropriately covered.

Reimbursement Process Following Approved Study/Examination Leave
- Completed Claims Forms MUST be accompanied with all receipts and proof of attendance. Further support and assistance can be accessed via the local Trust Medical Education Manager.
- There are Department of Health regulations concerning salary, travelling expenses and subsistence. All reimbursement claims must be submitted to the Employing Trust, within 28 days of incurred expenses, using the Trust Reimbursement Claims Form. Failure to meet this timescale may endanger a successful application.
- Unless special considerations exist, Trusts should pay all reasonable expenses that arise as a natural consequence of granting leave, that is, travelling and subsistence in accordance with prescribed rates, together with appropriate fees. Requests for partial funding WILL NOT be supported.
- Wherever possible, trainees must take advantage of concessionary fare arrangements.
- Claimants are advised to refer to their approval letter as to the subsistence allowances payable and as to which receipts are required for reimbursement when making a request for payment of expenses.
All applications for reimbursement should be accompanied by feedback and, or an evaluation on the content of the study leave together with a certificate of attendance (where these are available).

**Curriculum support Definition**
Leave to participate in education and training activity away from the workplace (study leave) is granted only when that activity supports the foundation or specialty curriculum. Overall responsibility for approval lies with the School, through the Training Programme Director (TPD), however approval is also needed from the Rota Co-ordinator. The TPD may delegate this responsibility to a member of the Specialty Training Committee or a Deputy TPD. Wherever possible such activity should occur locally, trainees will only be supported to attend educational activity outside the region when it is agreed as being relevant to the curriculum AND is not available locally.

**Curriculum Expectations**
The study leave entitlement is currently a maximum of 30 days per annum in total for all training grades, as defined within national Terms and Conditions.

Education and training activity that occurs within the workplace, such as teaching ward rounds, regular weekly teaching/tutorial meetings, journal clubs and protected teaching time within the working week does not count against the study leave entitlement.

Training activity that is arranged as an integral part of the School’s local educational programme will be counted against the leave entitlement. You still need to apply for this leave to ensure that service delivery is not compromised. If you do not attend the number of sessions/days that are required by the School programme, the access to alternative leave activities may well be restricted.

Trainees will be granted leave with pay and expenses (other than examination fees) for the purpose of sitting an examination for a higher qualification where it is necessary as part of an approved, structured training programme and meets curriculum requirements.

Leave will be granted, but without expenses, for second and subsequent attempts at the same examination. Where it is essential for doctors and dentists in training to obtain an appropriate higher qualification, financial support will not be provided to allow them to obtain the equivalent qualification of more than one College/Faculty.

Requests to attend Crammer courses or intensive learning/preparation courses for examinations are not supported; learning materials are available via the specialty Schools and the Trust Medical Education Centres and on the e-learning for health care websites. Medical Education Managers can provide relevant details.

**Medical GP Trainees**
General Practice Registrars (GPRs) are usually allowed to attend essential training sessions within the specialty and to attend half day release sessions (or equivalent block teaching modules) on the local Vocational Training Scheme.
These may include sessions unrelated to their current post but which are specifically designed to facilitate development in a chosen future career in General Practice. However, where possible, attendance at hospital specialty events should occur whilst the trainee is undertaking a placement in that specialty unless they specifically clash with the half day or block teaching events.

Whilst in a Hospital specialty post, GPRs should follow the same arrangements as described above, (Planning and making an application) to apply for leave. Applications should also be discussed and countersigned by the responsible GP Training Programme Director.

GP Trainees wishing to apply for specialty leave whilst in the GP Training Practice, should discuss these at the earliest opportunity with the Educational Supervisor.

**Diplomas (DRCOG, DCH, DGM)**
These are not considered necessary for the development of the core knowledge and skills for nMRCGP, however, these may be of interest to some GP Trainees, especially those who may wish to pursue a special interest.

If progress towards certification is satisfactory and there have been no concerns, leave will be available to sit these exams. Leave will be granted without expenses.

**Medical Foundation Trainees**
Foundation Year 1 (FY1) trainees are not eligible for funded study leave, however the requirement for suitable study opportunities is supported and defined by the Foundation School Director and will usually be arranged towards the end of FY1.

It is a requirement for Foundation Year 1 (FY1) trainees to attend the formal education programme which is provided within the NHS Trust. Attendance will be monitored and trainees must record attendance within the portfolio. Reasonable time within working hours to attend other educational events within the hospital will also be encouraged and should be recorded in the portfolio.

FY2 and DF2 trainees are eligible to access funded leave, however requests should be mapped to the Foundation curriculum and funds should not be used to prepare for specialist examinations.

Foundation Year 2 (FY2/DF2) trainees are required to attend generic training programmes organised by the Foundation School or their department as well as any regional study days. This is part of the study leave allowance. The trainee may take further study leave to a total of 30 days as long as this is consistent with maintaining essential service. This may include up to five days as “Taster days” in preparation for core and specialty training. Where possible these ‘taster days’ may be taken in FY1.

During the 2 years of Medical Foundation Training, trainees will be required to complete AND PASS an ALS course. Please liaise with the local Foundation Training Programme Director, Director of Medical Education or Medical Education Manager for details. Dental Foundation trainees must complete an annual CPR course, ideally to ILS level.
Trainees Training Less than Full Time
Trainees working less than full time are eligible to access leave on a pro rata basis to ensure annual progression through achievement of specialty curriculum competencies.

Academic Clinical Fellows (ACFs) and Clinical Lecturers (ACLs)
Study leave related to academic research is not funded by the NHS Trust Hospital based budget.

Academic Clinical Fellows (ACFs) and Clinical Lecturers (ACLs) holding an active National Training Number (ANTN) are eligible to apply for Masters programmes/components as well as access to a bursary for presenting data at appropriate National meetings only.

Applications to attend events relating to the academic part of the training programme should be directed to the Academic Training Programme Director and/or Medical School/Dental School in the first instance.

Locum Appointments for Training (LATs) and Fixed Term Training Appointments (FTSTAs) and FTTA or post CCST in Dentistry
Applications from trainees holding LAT or FTSTA/FTTA (Post CCST) appointments of more than 3 months. The decision to grant leave is at the discretion of the Educational Supervisor and Training Programme Director. All applications must follow the same process as described in ‘Planning and Making an Application’ above.

Monitoring leave taken
When monitoring leave, all the days approved are counted, including weekends and bank holidays because of the liability for expenses (study leave should be built into the training programme timetable and therefore planned in advance).

Private Leave Requests
The authorisation of requests for private leave is discretionary and is subject to the support and formal approval of the local DME, Educational Supervisor and Training Programme Directors. Private study leave will count towards the study leave entitlement and should only be awarded in exceptional circumstances e.g. immediately prior to examinations.

Applications for Examination Leave, Eire
Leave taking place in Eire is technically classed as ‘Overseas’. However, the Deanery accepts that occasionally there will be special circumstances when it will be reasonable for examinations in Eire to be taken. All expenses must be approved in advance.

If an application is approved, second class rail, and ferry expenses will be paid to Dublin.

Overseas Study Leave
There is no entitlement to overseas study leave and therefore any decision taken on approving overseas study leave is at the discretion of the Specialty School and Deanery. Financial support will take the form of an overseas grant.
Applications should be accompanied by a letter of support indicating the exceptional nature of the leave from the educational supervisor, information on the venue to be visited, and the nature of the activity.

All applicants should submit the appropriate application form a minimum of two months in advance of the proposed absence.

Under no circumstances will consideration be given to applications submitted in retrospect.

As the application is approved on a grant basis, it need not differentiate between fees, travel and subsistence. If the overseas study leave is appropriate educationally, the trainee can accept additional sponsorship up to 100% of the cost. This may be from Trust or Commercial sponsorship. Trainees must follow their Employers governance guidelines in relation to making the appropriate declarations.

**Guidelines for Attendance at Conferences Abroad**

Any of the following criteria can be applied to applications for overseas study leave,

- The frequency of attendance at conferences of any one individual, area or category of staff, including reference to previous study leave abroad which had been granted. The total number of applications received from one particular area / specialty for any particular study course/conference is also considered.

- The opportunities or lack of them, for the applicant to keep abreast or add to his or her knowledge, apart from study leave abroad.

- That the applicant has the capacity to benefit from the proposed study tour.

- That the value of the proposed conference is likely to be of sufficient benefit to the applicant and the National Health Service to justify attendance at National Health Service expense.

- The cost of the conference; that it is not excessive in relation to its current value for training purposes and the overall budget. The use of hospital funds and other sources of finance will be considered. It may well be that the applicant will make some contribution to the total cost. Applicants will be expected to travel by the most economic route.

- The applicant will be required to state the amount of financial support from other sources which will be made available to him or her.

- The applicant must produce a report to the Specialty Education Committee following his/her visit overseas.

**Sponsorship and Acceptance of Gifts and Hospitality**

Applicants are asked to note that even where financial assistance is not being requested, it is still necessary to apply for leave. Staff should be aware of the Trusts policy on the acceptance of hospitality.
Meetings at which Trainees Present Papers
Trainees should be encouraged to present papers at academic meetings. The decision as to whether this should be allowed against the study leave entitlement and funded from the Curriculum development resource will depend on whether or not the meeting concerned is judged to be of educational value to that trainee.

Appeals Procedure
If a trainee has a request for leave to attend educational activity away from the workplace refused they may appeal to the Head of School or the Postgraduate Dental Dean for Dental trainees.

If the School approves the leave but the employing Trust refuses to release the trainee then an appeal should be made to the DME.

Trainees who wish to appeal should bear in mind that leave is discretionary and Trusts may refuse if maintenance of the service is compromised.

All appeals must be in writing and submitted with comprehensive and detailed documentary evidence in support of the appeal. Those involved in the appeals process will only consider written evidence placed before them in a timely fashion.

In cases where there has been a prima facie breach of the Terms and Conditions of Service or the guidelines in this document, and the matter is not settled to the applicant's satisfaction by the local Trust appeals procedure, the applicant then has the right to appeal to the Postgraduate Dean or Postgraduate Dental Deans.

To register an Appeal, please:

- Submit an appeal in writing (either via post or email and in confidence) to the Deanery General Manager, Yorkshire and the Humber Postgraduate Deanery, Willow Terrace Road, University of Leeds, Leeds LS2 9JT (fran.mead@yorksandhumber.nhs.uk). Appeals to the Deanery must include evidence that you have followed the Local Trust Appeal Process.

- The Deanery General Manager should receive an appeal within 15 working days of the Local Trust Appeal decision being confirmed.

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