

Health Education England Yorkshire and the Humber Operational Study Leave Guidance

Background

HEEYH adheres to overarching HEE guidance on Study Leave for Postgraduate Doctors in training.

<https://www.hee.nhs.uk/sites/default/files/documents/Health%20Education%20England%20%28HEE%29%20Study%20Leave%20-%20An%20overview%20of%20the%20HEE-wide%20approach.pdf>

It is recognised that national guidance can be open to local interpretation and Postgraduate Doctors in training report that sometimes, there is variation in approach across the Schools.

This document has been produced in conjunction with the Yorkshire Trainee Executive Forum and addresses the areas of the guidance that are important for trainees in Yorkshire and the Humber.

School-Specific arrangements

It is important to note that although all Schools adhere to the overarching HEE guidelines on Study Leave - Foundation, Dentistry and General Practice do have some operational differences to Specialty Schools in Yorkshire and the Humber.

Postgraduate Doctors in training working in Foundation, General Practice and Dentistry training programmes should read this guidance in conjunction with the following guidance for their School;

Foundation

Study leave will normally be granted flexibly and tailored to individual needs, in accordance with the requirements of the curriculum and the Postgraduate Doctor in training's individual personal development plan.

Study leave for Foundation Year 1 doctors (maximum 15 days) will take the form of a regular scheduled teaching/training session as agreed locally. Additionally, F1 doctors can use up to 5 days of Foundation Programme study leave for tasters to inform future career decision making.

Study Leave for Foundation Year 2 doctors (maximum 30 days) will include periods of regular scheduled teaching/training sessions delivered locally and, for many, no additional support will be needed. Study Leave may also, with the appropriate local approval, include:

- Undertaking an approved external course aligned to the curriculum: this includes an appropriate course enabling the F2 doctor to meet the curriculum requirement for 'initiation and performance of advanced life support' (unless already completed in F1) and occasionally other activity intended to support Foundation doctors achieve their curriculum outcomes.

- Periods of sitting an examination aligned to their future career intention.

General Practice

The School of General Practice run a programme of 'half-day release' teaching that represents the majority of study leave for Postgraduate Doctors in training in the School. Private study leave is part of the 30-day allocation.

Dentistry

The School of Dentistry run a programme of regional teaching for their Foundation Dentists, which constitutes the majority of their study leave allowance. Postgraduate Dentists in training working in secondary care may access private study leave as part of their 30-day allocation in line with Postgraduate Doctors in specialty training.

Process for applying for Study Leave in Yorkshire and the Humber

- A process flow chart for the application and approval of study leave is available [here](#).
- Postgraduate Doctors and Dentists in Training within HEE YH must use the universal HEE YH Study leave request form to apply for Study Leave [Generic Study Leave Application form HEEYH](#)
- Study Leave requests must normally be submitted within the individual's Local Education Provider (LEP) at least 8 weeks prior to the first day of leave to ensure the rota will not be adversely affected. A Trust may use its own discretion to consider requests from individuals that are submitted either retrospectively or within the 8-week notice period, as the responsibility to approve time off a rota is held at Trust level.
- Postgraduate Doctors and Dentists in training should wait for costs to be approved before making payments. If an applicant chooses to pay for a course prior to approval being granted they risk incurring costs which may not be re-funded.
- Part A and B of the study leave request form should be completed and then signed (on paper or as an electronic signature) by the Rota Co-ordinator and the Educational Supervisor. Depending on the type of study leave request, supporting documentation may also be submitted.
- If the period of study leave falls when a Postgraduate Doctor or Dentist in training has rotated to a different LEP, prospective approval from that LEP is required. In exceptional circumstances (where the future LEP is not known), the current LEP can approve this. If this is approved, the Postgraduate Doctor or Dentist in training must make their new colleagues aware at the earliest opportunity.
- Where funding is to be reimbursed, Postgraduate Doctors and Dentists in training should follow local guidance at their place of work on claiming expenses.
- Postgraduate Doctors and Dentists in training must update their portfolios with evidence of carrying out their study leave, and feedback on its value.

- Where study leave is to be taken by a Postgraduate Doctor or Dentist in training on their non-workday or a weekend, this must be agreed by the responsible educational and LEP. Any time to be taken as time off in lieu must have prior agreement with the LEP to approve suitable time off the rota.

Process for claiming associated expenses

- Postgraduate Doctors and Dentists in training are required to pay their expenses and will then be reimbursed as per the rates set out in appendix 1 provided the original receipts are submitted within 6 weeks of the event. If a Postgraduate Doctor or Dentist in training pays above the maximum rates allowable, they will usually be required to meet any excess costs themselves.
- Postgraduate Doctors and Dentists in training are to choose transport that is value for money.
- Postgraduate Doctors and Dentists in training should book advance tickets where possible to minimise costs. First-class fares will not usually be reimbursed unless it can be demonstrated that this purchase was cheaper than standard fares
- Postgraduate Doctors and Dentists in training are required to pay the cost of any social events themselves.
- Postgraduate Doctors or Dentists in training are required to pay for approved courses/events 'up front' themselves and claim costs back via their employer. Payments in advance for courses/events will not routinely be made other than in exceptional circumstances.
- The Postgraduate Doctor or Dentist in training must retain all expense/itemised receipts (e.g., hotel bills, credit card slips etc.)
- The Postgraduate Doctor or Dentist in training submits their claim to the Medical Education team within their employing Trust, adhering to local processes for expenses claims.
- The Medical Education team consider the claim. If the claimed expenses differ significantly from the estimated expenses listed on the original application form the Specialist Study Leave Advisor will be consulted and expenses may not be paid.
- Employing Trusts are reimbursed for all claims made by Postgraduate Doctors and Dentists in training via the NHS Education Contract.

Discretionary Leave

- Discretionary study leave can be granted for educational or professional development opportunities that enhances the knowledge, skills and attitudes of the Postgraduate Doctor or Dentist in training or enhances any aspect of patient care but is not mapped to any direct curriculum requirements. This may include conferences but is not limited to such events. Postgraduate Doctors in training should feel able to apply for any activity that links to their career progression.

- Such activities will be either fully funded or part-funded up to £500 per year, reflecting both HEE and the Postgraduate Doctor or Dentist in training's commitment to their enrichment. Discretionary activity costing more than £500 may be funded, at the discretion of the approving School.
- Reasonable adjustments and consideration of individual circumstances must be given for discretionary study leave applications (including international) from Postgraduate Doctors and Dentists in training with protected characteristics.

International Study Leave

- One funded international conference/meeting that is either delivered face to face or online via remote delivery hosted outside of the UK, (providing all other curriculum requirements are met) will be considered for each Postgraduate doctor or dentist in training for any one programme, or otherwise every three years to ensure there is no disadvantage to doctors on a run-through programme. Trainees working less than full time on a run-through programme may apply for one activity during ST1-3 and one activity during ST4 and above.
- If further periods of international study leave are required, this will be considered on a case-by-case basis by the Head of School.
- Funding for approved international study leave requests will only be considered for either the full cost of the course/conference fees or the full cost of economy travel and accommodation (whichever is the lower of the amounts).
- In line with the agreed maximum rate for study budget claims within the UK, the overnight rate should not exceed £150 per night for international events.
- Maximum reimbursement for international leave should not exceed £500.

Private Study Leave

- Private study leave for the purpose of home-based revision will normally be taken within 6 weeks from the date of the exam and normally runs from Monday to Friday. Postgraduate Doctors and Dentists in specialty training may take up to 5 days of private study per exam attempt. Private study leave is part of the 30-day annual allocation of study leave for Postgraduate Doctors and Dentists in training.
- Postgraduate Doctors and Dentists in training are not entitled to any expenses for private study leave.
- Private study leave is authorised by the employer to ensure safe staffing levels.

Travel and Subsistence allowances

Listed below are the maximum amounts Postgraduate Doctors and Dentists in training can be reimbursed.

Overnight Allowances

This is to cover all expenses whereby overnight accommodation is required for one night or more.

Accommodation: For single occupancy only, in the event of shared occupancy only 50% of the costs will be refunded.

Up to £120 per night for overnight accommodation outside of London, and up to £150 within London and overseas

Night Allowance in Non-Commercial Accommodation (friend or relative's accommodation): £25. This includes a meal allowance and the address must be provided.

Meals (where overnight accommodation required): £20.00 – max per 24hr period

Day Meals Allowance – *for reimbursement, an employee shall certify accordingly on each occasion when meal allowance is claimed but a receipt is not required.*

This allowance can be claimed if where an individual is away from home but does not stay overnight.

Lunch (more than 5 hours away including the period between 12:00-14:00HRS): £5.00

Mileage

Individuals may claim for travel in their own car by the most direct route at the rate of **28p/mile**. Only the shortest mileage between base hospital and destination can be reimbursed. Tunnel and bridge tolls will also be reimbursed if receipts provided. Parking charges at your destination will normally be reimbursed.

Rail Travel

Cheapest standard class rail should be claimed

Review date: September 2023