

# Study Leave – Operational Guidance

## Standard Operating Procedure

Yorkshire and Humber Deanery

Workforce Training and Education, North East and Yorkshire, NHS England

September 2022



<b>Name of Document</b>	<b>Study Leave – Operational Guidance</b>		
<b>Category</b>	Standard Operating Procedure (SOP) - Trainee management <b>This SOP is only applicable to relevant programmes within Specialty Training.</b>		
<b>Purpose</b>	This document is one of a suite of Standard Operating Procedures to support the management of trainees across England. This SOP is aligned to the principles of 'A Reference Guide for Postgraduate Foundation and Specialty Training in the UK' (The Gold Guide) and 'A Reference Guide for Postgraduate Dental Core and Specialty Training' (The Dental Gold Guide). Please refer to the most recent versions.		
<b>Authorised by</b>			
<b>Date Authorised</b>			
<b>Implementation Date (current version)</b>			
<b>Next Review Date</b>	SOP to be reviewed in line with any future Gold Guide revisions, or every 12 months, whichever comes first.		
<b>Document Author</b>			
<b>Version</b>	<b>Date</b>	<b>Author</b>	<b>Notes</b> Reason for Change, what has changed, etc
1	September 2022	Emma Howe, Katie Cobb	New guidance
2	February 2023	Chloe Anderson	Updated to reflect use of Accent Leave Manager across Yorkshire and the Humber
3	January 2024	Chloe Anderson, Katie Cobb	Updated in line with national NHS England guidance on study leave for doctors and dentists in training

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### 1. Document Status

This is a controlled document. Whilst this document may be printed, the electronic version posted on the SharePoint site is the controlled copy. Any printed copies of this document are not controlled.

This document is not intended to be interpreted as a policy statement. This is a local guidance document for faculty and staff in the Yorkshire and Humber Deanery to enable consistency of application; it is recognised there may be exceptional circumstances when deviation from this guidance may be required.

### 2. Purpose of the Guidance

Yorkshire and the Humber Deanery adheres to overarching NHS England guidance on Study Leave for Postgraduate Doctors in training.

<https://www.hee.nhs.uk/sites/default/files/documents/HEE%20Study%20Leave%20-%20An%20overview%20of%20the%20HEE-wide%20approach%20March%202023.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.

### 3. School-specific arrangements

It is important to note that although all Schools adhere to the overarching NHS England 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 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.
- 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 for courses and exam preparation (in addition to the mandated self-development time/self-directed learning time within the job plan) 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.

## 4. Process - study leave in Yorkshire and the Humber

### Application

- Process maps to demonstrate approval chains when applying for [Study Leave](#) and/or [Regional Teaching](#) are available on our website.
- Postgraduate Doctors and Dentists in Training working within Yorkshire and the Humber Deanery must apply for Study Leave via [Accent Leave Manager](#). Accent Leave Manager is an online application/approval system for the management of study leave activity.
- Prior to making an application in Accent Leave Manager Postgraduate Doctors and Dentists in Training must secure the time away from service with their Rota Co-ordinator using e-roster or via other local processes. They should also seek support from their Educational Supervisor or equivalent ideally at their routine educational meetings so approval can be documented in the e-Portfolio.
- Study Leave requests must normally be submitted 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 reimbursed.
- Where funding is to be reimbursed, Postgraduate Doctors and Dentists in training should follow their employers guidance and system(s) for claiming expenses.
- Postgraduate Doctors and Dentists in training must update their e-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 educational supervisor (or equivalent) 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.

### Claims

- 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 demonstrates 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 original Approver 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.

### 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 at the discretion of the Training Programme Director. 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.

## 5. Equality Impact Assessment (EIA)

English Deans are committed to equality, diversity and inclusion (EDI), with a duty to eliminate discrimination, promote equality and ensure inclusive opportunities are available to all with regards to age, disability, gender, ethnicity, sexual orientation, religion or belief in the

design and delivery of all our services. English Deans aim to meet and exceed their statutory obligations under the Equality Act 2010 by adopting a continuous improvement approach.

## 6. Appendix A

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 (broken down into £5 for lunch and £15 for evening meal)

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

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

### Mileage

Individuals may claim for travel in their own car by the most direct route at the rate of **30p/mile**. Only the shortest mileage between base hospital and destination can be reimbursed. Tunnel and bridge tolls will also be reimbursed if receipts are provided. Parking charges at your destination will normally be reimbursed.

## **Rail Travel**

Cheapest standard class rail should be claimed.