

Accessing centralised study budgets – a guide for trainees

Why is the study budget changing?

As trainees, you said:

- You were frustrated with the current system for accessing study budgets
- You had inconsistent and inequitable experiences when applying for study leave and funding which varied across geographical regions and clinical specialties
- You paid for most of your educational courses/activities personally with expenses infrequently reimbursed.

In response, Health Education England (HEE) did the following:

- Proposed study budget changes to address trainee concerns as part of the initiative 'Enhancing Junior Doctors' Working Lives'
- Removed study leave funding from the tariff fee paid by HEE to NHS Trusts for trainee placements
- Established management of the study leave budget centrally through its local offices to nationally improve study leave access, educational training and funding support for all trainees.

What are the benefits of the new process?

The new HEE-managed centralised process will make accessing study leave and study budgets a more transparent, equitable and streamlined process for all trainees.

There is a clearer definition of how the study budget should be used to support individual professional development. This includes:

- Covering costs of educational courses/activities that support curriculum attainment
- Agreement that NHS Trusts will cover costs of all mandatory training required to fulfil the trainee's clinical role e.g. life support courses, safeguarding training
- Guidance on what the study budget *will not* cover e.g. College examination fees
- Provision of discretionary funding for individualised training opportunities.

Centralised oversight will enable HEE to:

- better monitor the courses trainees are attending
- promote high educational standards for courses
- consider funding and implementing high quality local courses for the training initiatives in highest demand – reducing trainee costs and improving trainee access to these learning opportunities.

GP, Public Health & Dentistry Trainees

The proposed changes will not affect GP trainees in a General Practice placement, trainees in Public Health or Dentistry. There is separate study leave funding for these specific trainees and they should continue to apply for it as previously. It is important to note that the new process will apply to *GP trainees in hospital placements*.

Gold Guide 6th Edition 2016¹

The Gold Guide states that access to study leave should form part of the educational contract between Postgraduate Deans and providers of postgraduate medical education. It highlights the Postgraduate Deans' responsibility to ensure less than full time (LTFT) trainees have equitable access to study leave. The Gold Guide also encourages trainees on career breaks to keep up to date by attending educational events but stipulates that there is no entitlement to study leave funding for this.

Terms and Conditions of Service for NHS Doctors and Dentists in Training (England) 2016²

The terms and conditions related to study leave are covered in Schedule 9 and state the following:

1. Study leave must be used for the purpose for which it is granted.
2. Study leave includes but is not restricted to participation in:
 - Study (linked to a course or programme)
 - Research
 - Teaching
 - Taking examinations
 - Attending conferences for educational benefit
 - Rostered training events
3. Attending statutory and mandatory training (including any local departmental training) is not counted as study leave.
4. All requests for study leave will be properly considered by the NHS Trust. Any grant of study leave will be subject to the need to maintain NHS services (and, where the doctor is on an integrated academic pathway, academic responsibilities) and must be authorised by the NHS Trust.

¹ A Reference Guide for Postgraduate Specialty Training in the UK, The Gold Guide, Sixth Edition, <http://specialtytraining.hee.nhs.uk/files/2013/10/Gold-Guide-6th-Edition-February-2016.pdf>

² Terms and Conditions of Service for NHS Doctors and Dentists in Training (England) 2016, Version 2, 30 March 2017
<http://www.nhsemployers.org/~media/Employers/Documents/Need%20to%20know/Terms%20and%20Conditions%20of%20Service%20for%20NHS%20Doctors%20and%20Dentists%20in%20Training%20England%202016%20Version%202%2030%20March%202017.pdf>

5. Study leave up to the limits described in Table 1 below will normally be granted flexibly and tailored to individual needs, in accordance with the requirements of the curriculum. Requests for study leave in excess of these limits should be considered fairly where circumstances indicate such requests to be reasonable, and may be granted by the employer provided that the needs of service delivery can be safely met.

Grade	Days per annum
Foundation Doctor Year 1	15
All other Doctors in training	30

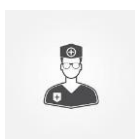
Table 1 Table 1 - Study Leave allowance for trainees.

6. Study leave for Foundation Year 1 doctors will take the form of a regular scheduled teaching/training session as agreed locally.
7. Study leave for doctors at Foundation Year 2 and above will include periods of regular scheduled teaching/training sessions, and may also, with approval from the educational supervisor and service manager, include:
- Undertaking an approved external course
 - Periods of sitting (or preparing for) an examination for a higher qualification where it is a requirement of the curriculum.

Requests for such leave shall be viewed positively in most circumstances, but with a view to ensuring that the needs of service delivery can be safely met.

8. Where a doctor working less than full time is required to undertake a specific training course required by the curriculum, which exceeds the pro rata entitlement to study leave, the employer will make arrangements for additional study leave to be taken, provided that this can be done while ensuring safe delivery of services.
9. Where a doctor takes maternity leave their entitlement to study leave continues, and this may be taken during 'keeping in touch' days or will otherwise accrue to be taken at a later date.

How can I access study leave and funding?



Discuss study leave plans with your Educational Supervisor/Training Programme Director



Commissioning excellent education

Make sure you confirm the time off required for study leave with the rota co-ordinator in accordance with local timescale processes

Submit study leave application to your Educational Supervisor with confirmation that the time off has departmental approval and will not affect your agreed work schedule



Lifelong investment in people:

Your Educational Supervisor will review the application against curriculum requirements and your personal development plan

Your application should be signed off and confirmed by the Educational Supervisor within accordance to local timescale processes

Yes



No

Once approved you can undertake your educational course - make sure you keep hold of receipts



Submit an expense claim to your employing NHS Trust in accordance with local processes and provide proof of attendance and receipts



The NHS Trust will approve expenses and reimburse you via payroll in your monthly pay



What are my responsibilities?

Trainee

- Discuss personal development plan and educational activities with ES/TPD
- Complete learning agreement with ES
- Register with electronic system (TIS) if available to submit study leave applications
- Ensure approval for time off the rota is obtained with at least 6 weeks' notice
- Make sure any study leave will not affect your agreed work schedule
- Obtain approval from ES, Rota manager and Director of Medical Education (DME, NHS Trust) for educational activity
- Book course/activity
- Update e-Portfolio with evidence of attendance after event
- Submit expense claim to DME/Postgraduate manager within 4 weeks of course attendance
- Inform Postgraduate Centre if course is cancelled

Educational Supervisor

- Discuss personal development and study leave plans with trainee
- Clarify appropriate courses/educational activities to support curriculum attainment
- Authorise study leave in timely manner within 2 weeks of application receipt

Study budgets DO cover

- ✓ Courses/education activities to support you achieving the curriculum
- ✓ Courses to help you prepare for postgraduate exams
- ✓ Discretionary courses that add value to you individually and support the wider system

Study budgets DO NOT cover

- ✗ Postgraduate exam fees
- ✗ Any statutory or mandatory training required to fulfil your clinical role (this should be provided by your NHS Trust)

Accessing aspirational funding

Discretionary study budget is available to trainees for courses/activities which add value to the individual and support the wider system. If you plan to apply for this, discuss early with your ES/TPD and make sure you have achieved your required curriculum and competencies to support your application.

LTFT and Academic trainees

LTFT and academic trainees will have equitable access to study leave.