

## 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 6<sup>th</sup> Edition 2016<sup>1</sup>

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) 2016<sup>2</sup>

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.

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<sup>1</sup> 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>

<sup>2</sup> 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             |

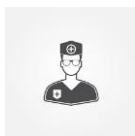
*Table 1 Table 1 - Study Leave allowance for trainees.*

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

If your application is not approved, the Educational Supervisor will confirm this in writing and provide reasons for this decision

Study Days

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.

## FAQs

*I am ST5 in Radiology, have completed FRCR and achieved my required competencies. I would like to apply for funding to attend a quality improvement workshop – will the discretionary study budget cover this?*

Yes – this is exactly the type of course which will add value to you individually and the wider system. Other examples are leadership/medical management courses, healthcare technology and innovation workshops, scientific conferences. Discuss your plans early with your ES/TPD and apply.

*I am a Core Medical Trainee and am preparing for MRCP Paces – will the study budget cover revision courses and the exam fee?*

The study budget will cover courses to help you adequately revise and prepare for PACES but will not cover exam fees.

*I am a CT1 trainee in Psychiatry and want to attend the RCPsych Electroconvulsive therapy team day - how do I know if this is aligned with the curriculum and will be covered by the study budget?*

Any courses required to support you achieving the curriculum are covered by the study budget. Discuss any courses/educational activities you would like to attend with your ES/TPD and they will be able to advise and support your application if it is appropriate.

*I am a FY2 trainee and about to start a rotation on the neonatal intensive care unit. As part of my rotation I am required to complete Neonatal Life Support – will the study budget cover this?*

No – this course is required for your service commitment and does not fall within your curriculum. The NHS trust should provide funding for this training.

*I am a LTFT ST4 trainee in Respiratory medicine and am concerned that I will not be able to access study leave in the same way full-time trainees do?*

Please be reassured, the new system supports all trainees including LTFT and academic trainees to access study leave and funding in an equitable way. You are entitled to the same support full-time trainees receive for curriculum requirements.

*I am a GP trainee on an A&E rotation, will the new process for accessing study leave and funding apply to me?*

Yes, unlike GP trainees on a General Practice placement, you will need to apply for study budget using the new process. It is only GP trainees on Practice placement, Public Health and Dentistry trainees who will continue to access study leave funding in the way they have previously with no changes.

*I am an ST4 Palliative Medicine trainee on a placement in the hospice setting, how should I apply for study leave and funding?*

You should apply using the new process as outlined in this guide.

*I am a Core Medical trainee and am worried that the course I wish to go on will be in excess of my study budget annual allowance?*

The new centralised study budget process means there is no annual allowance. If the course will support you achieving the curriculum or falls within the remit of aspirational funding, it will be covered by the study budget. Discuss any courses/educational activities you would like to attend with your ES/TPD and they will be able to advise and support your application if it is appropriate.

*I am ST3 in Oncology and have had study leave approved for a conference tomorrow. Unfortunately, due to unforeseen factors, circumstances have transpired that mean I am no longer able to attend. I have already paid for the conference – who is financially responsible?*

It is your responsibility to try and obtain a refund for the conference as far as is practically possible. Under these rare circumstances if you are not able to obtain a refund, Health Education England will attempt to cover the costs of the conference to reimburse you.

*I am ST2 in Pathology and am concerned about the time delay between paying for the course I wish to attend and being reimbursed?*

The new system will still require that you pay for the course and then claim for expenses with proof of attendance and receipts. However, HEE has established a centralised system to access study budgets so that you are now guaranteed to be fully reimbursed. Please bear in mind that all study leave expenses will be reimbursed in your monthly pay and will therefore align with payroll.

*I am an ST5 ENT trainee and want to apply for study leave and funding to attend a course at the start of my next rotation which will be based at a different NHS trust – how should I apply?*

Discuss any courses/educational activities you would like to attend with your current ES/TPD for approval. For the time off required to undertake your study leave, you must obtain approval from the rota co-ordinator who will be managing cover at your new NHS Trust. Once you have been on the course, submit your expense claim to the new NHS Trust where you will be working at by then.