

# Curriculum Study Leave Policy

## August 2018



## Notes about this document

### This document is published by:

The Faculty Support Team  
Health Education England, working across the East Midlands

It applies to **all** junior doctors in training in the East Midlands region  
It **does not** apply to doctors who are not in training

It supersedes all previous versions and is effective from 1 August 2018

**Hard copies are not provided and should be avoided. All amendments will be published online on our [website](#).**

### Updates from previous versions

From 2016-3:

- Updated entitlements, as agreed by the appropriate School.
- Included contact details for other HEE EM teams.
- Change of contact details for HEE teams.
- Updated to reflect national changes to CSL.

### We're here to help

We hope that you find this document clear and informative. It is designed to help all those involved in Curriculum Study Leave – junior doctors in training, trainers, Trusts and GP Practices. We understand that junior doctors are busy and have many conflicting demands, so we try to make CSL as straightforward as possible. We don't get it right all the time, but we really do try to!

We welcome feedback so if you'd like to provide some, please email us. Please don't hesitate to contact us in the event of a query – we like to answer your questions!

You can email us on [CSL.EM@hee.nhs.uk](mailto:CSL.EM@hee.nhs.uk).

Thank you.

## The policy

### Introduction

This document sets out the policy for Curriculum Study Leave (CSL) in Health Education England working across the East Midlands (HEE-EM) for all Doctors and Dentists in training (in this document, referred to as 'junior doctors').

HEE-EM uses an online system called **Intrepid Leave Manager** ([www.intrepidv10.co.uk/HEE](http://www.intrepidv10.co.uk/HEE)) for junior doctors to request approval for study leave for events (including courses, conferences and exams) and private study required to meet their curricular requirements. Some Trusts require junior doctors to also apply for leave for regular internal teaching using this system. All applications must be submitted in advance using Leave Manager. Retrospective applications are not permitted, and it is therefore not possible to submit a retrospective application on Leave Manager.

In general, each junior doctor will have an annual entitlement of 30 days' study leave which is split into 'internal' and 'external' days. The next section, Types of Study Leave, covers the difference between the two. Leave Manager will only allow junior doctors to submit applications which do not exceed their remaining entitlement.

For junior doctors employed by Trusts, the previously available notional budget has been replaced with the provision of funding for the acquisition of curriculum competences. However, consideration may be given by Exception approvers for non-curriculum activities with the goal of supporting junior doctors to attain additional competences. Access to this budget is subject to the rules on study leave entitlements covered [later](#) in this document.

There are two types of application: Standard and Exception. Schools produce a list of events approved for specific grades and specialties. To apply for these, a **Standard** application should be made. For events not on this list, an **Exception** application should be made.

Approval chains are short – in most cases with just one person required (to approve the time off). The CSL application process is as follows:

1. Junior doctor applies on Leave Manager and includes any estimated expenses
2. Approval of time off by Programme Office (GP only)
3. Approval of time off by rota coordinator/JDA/Practice Manager/local equivalent
4. Approval of educational suitability by TPD/Head of School ([Exception request only](#))
5. Notification of outcome
6. After leave has taken place junior doctor claims expenses (if relevant) from employer

Applications may not always proceed as expected. Please refer to [Appendix A](#) for potential reasons for this.

### Course Manager

HEE East Midlands also uses a separate booking system for courses run by/through HEE called **Intrepid Course Manager** (<https://secure.intrepidonline.co.uk/CourseManager/EMD/>). This only applies to HEE courses; Royal College courses (among others) will not generally be available through Course Manager.

## Health Education England working across the East Midlands

Please be aware that these are currently separate systems; if you book onto a course through Course Manager, you must also request study leave (if required) through Leave Manager ([www.intrepidv10.co.uk/HEE](http://www.intrepidv10.co.uk/HEE)). The next version of Leave Manager (currently under development) may integrate the two systems to streamline the process, but for the time being please ensure that you request study leave in addition to booking your place on a course.

If you have any queries/issues regarding Course Manager, please email [ESD.EM@hee.nhs.uk](mailto:ESD.EM@hee.nhs.uk).

## **Types of Study Leave**

Study leave is divided into two parts: Internal and External. The TPD can request a change to the ratio of internal to external leave, providing this applies to all junior doctors at the same stage of the training programme. This is usually done annually in advance of the start of the academic year.

### **INTERNAL**

- a) This will include locally delivered teaching; for example, weekly afternoon teaching and monthly regional teaching and any protected teaching time within job plans. Generally, this leave does not need to be applied for on Leave Manager; however, some Trusts require junior doctors to do so. Junior doctors are advised to check in each Trust as processes could be different around the region.
- b) Internal leave also includes internal events and, for Foundation, taster sessions. This needs to be applied for on Leave Manager.
- c) Junior doctors should inform their TPD and/or Head of School should they feel that they are not receiving their entitlement of internal study leave.

### **EXTERNAL (including Private and Examination Leave)**

- a) External leave is for events provided outside the region. It also includes Private Study Leave and Exam Leave.
- b) Events not on the pre-approved list for the junior doctor's grade and specialty will be considered, as exceptions, by the TPD or Head of School (the Exception Approver on Leave Manager). These exceptions should be of educational benefit and value for money. Exception requests always come from a junior doctor's external entitlement.

### **PRIVATE**

Private Study Leave can be taken for up to five days per year and should only be for exam preparation immediately prior to the exam. This comes out of the external allocation.

In GP training programmes, the maximum Private Study Leave Entitlement is 2 days preparation for AKT, 1 day for CSA preparation.

## **Examination Leave**

- a) Examination leave can be given for examinations that are part of the structured training programme and necessary for the acquisition of a CCT.
- b) Examination leave can only be approved with pay and expenses (not including professional fees) within the United Kingdom.
- c) Subsistence and travelling expenses claims to and from the venue may be payable if set out in the original application and subsequently approved. For examinations in Ireland, second-class rail and the cheaper of flight or ferry will be paid.
- d) Professional examination fees are never reimbursed.

## **When not to apply for CSL**

Leave for Mandatory Teaching expected of your employer, Interview Leave and Employer Related leave do not come under CSL and this leave should not be booked on Leave Manager.

Please note that attendance at GP Selection Centre, Specialty Training or Consultant interviews is not Study Leave and this should not be applied for on Leave Manager. Junior doctors should seek advice from their Trust about applying for Professional Leave in these situations (local arrangements may apply).

## **Study Leave Entitlements**

- a) The study leave year runs from changeover date in August to the changeover date the following August except for programmes with nationally agreed start dates in September, where the leave year is September to September.
- b) Unused study leave days cannot be carried forward to the next leave year.
- c) Study leave applications must be submitted on Intrepid Leave Manager prospectively, including any appropriate expenses; this applies even when the activity takes place on a non-working day (see point i below regarding lieu days). Expenses claims submitted to Trusts without a corresponding leave request and expenses on Intrepid will not be paid. Leave requests and/or expenses will not be added retrospectively except in exceptional circumstances; if you feel that this applies to you, please contact [CSL.EM@hee.nhs.uk](mailto:CSL.EM@hee.nhs.uk).
- d) Study leave should not be used for courses required by Trusts solely to work clinically (e.g. Advanced Life Support); this should be provided/funded by the Trust unless explicitly a curriculum requirement.
- e) Junior doctors on maternity leave will receive a reduced entitlement for this period, although this can be expanded on request.
- f) Those on Public Health, Dental or GP training programmes (in a Practice placement) receive slightly different financial entitlements due to different funding arrangements; please see [Appendix B](#). Doctors and Dentists on Foundation training programmes do not receive a financial entitlement.
- g) Entitlement to CSL ends once a junior doctor reaches CCT and junior doctors are not entitled to CSL during the Period of Grace.
- h) Due to the requirements of the Leave Manager system, a budget must be set in order for expenses to be claimed. We have agreed an initial budget of £1000 will be added to all eligible doctors' accounts for the 2018/19 training year as this is likely to exceed most doctors' requirements. This will be reviewed throughout the year by each School, and can be increased on request.

- i) Junior doctors on Out of Programme Experience (OOPE), Out of Programme Research (OOPR) or Out of Programme Career Break (OOPC) are not entitled to CSL for the period they are out of programme. Junior doctors on Out of Programme Training (OOPT) are normally only entitled to CSL for this period if they are occupying a training post on a training programme in our region.
- j) For study leave taken over weekends, bank holidays and days when you would not otherwise be working you can either take time off in lieu or not declare those as time off in the application process (by entering 0 for study leave days when submitting the leave request). If you wish to take time in lieu, you must apply for the original leave date (on weekends/bank holidays/non-working days) prospectively on Intrepid. Arrangements for taking the time off in lieu should be discussed with employers prior to taking the initial study leave.
- k) Where a course is offered by HEE/a HEE East Midlands school (e.g. Leadership & Management), funding will not generally be approved for the same/similar course delivered by an external provider. If you are unable to attend the East Midlands course, and need to have completed the course before the next East Midlands date, please [contact us](#) as early as possible to discuss this.
- l) Submitting leave requests containing knowingly false information may be considered a probity concern; if you are found to have deliberately submitted incorrect leave requests to claim funding, this will be reported to your Head of School and the Revalidation Team. Examples that may be considered include (but are not limited to):
  - Leave requests with incorrect dates, as the leave was not requested prospectively.
  - Selecting an 'approved' activity when this clearly does not reflect the actual activity attended.
  - Submitting Estimated expenses with your initial application, then claiming amounts significantly in excess of this (mitigating circumstances may exceptionally be considered if you were genuinely unaware of the likely costs)

## **Applications for study leave**

- a) Applications should be consistent with the aims of the junior doctor's personal development plan (PDP), as agreed by their Educational Supervisor. This should be discussed before the leave application is submitted.
- b) All CSL activities for which you want to use Study Leave days or budget must be applied for through Leave Manager. This includes any event for time only, or if you only wish to claim expenses (see above section regarding study leave on non-working days).
- c) Applications must be made at least six weeks before the period of leave.

## **Reimbursement of study leave expenses**

- a) Claims for reimbursement of expenses must be made to the junior doctor's Employing Trust/GP Programme Office as soon as possible after the leave has taken place, and within six weeks of the leave being completed.
- b) Claims can only be made against leave that was prospectively submitted using Leave Manager, where the estimated expenses were included on the application, and the leave application has been approved; this applies even when the activity takes place on a non-working day (see point i in Leave Entitlements above regarding lieu days). Junior doctors are therefore reminded to include costs on their application.
  - If you have difficulty submitting a leave request or forget to include costs on your application, contact the CSL Team as soon as possible to resolve this. Retrospective

requests for leave requests/expenses to be added will not be accepted unless the Study Leave team has been contacted ahead of the activity.

- c) Evidence of attendance, such as a certificate of attendance and evidence of approved expenses, such as travel receipts, are mandatory for making a claim.
- d) Claims must be made using the appropriate Trust/GP Programme Office process. Late claims will not be reimbursed unless accompanied by a letter setting out the exceptional circumstance that led to the delay.
- e) Unless special considerations exist, Trusts should pay all reasonable expenses approved on Leave Manager, in line with applicable rates, without exceeding the amount approved.
- f) Where possible, junior doctors must take advantage of concessionary fares. 'First class' and other premium class travel will not be reimbursed.
- g) In addition to course fees, the following expenses can be applied for: Overnight accommodation, staying with friends or relatives, mileage or travel costs and meal allowances (please see [Appendix C](#) for details).
- h) Unauthorised Costs include:
  - Retrospective applications
  - Examination fees
  - Membership/subscription fees
  - Credit card charges
  - Conventions
  - Ceremonies
  - Equipment, books or printing costs
  - Costs that do not relate to the period of study leave
  - Excess expenses will not be refunded as they are not part of CSL



## Special Cases

### Academic Training

- a) Only applications related to postgraduate clinical training should be made using Leave Manager.
- b) Study leave related to academic research that is additional to the acquisition of the relevant GMC approved curricular competencies should not be funded by the Study Leave budget, but through the funding source for the junior doctor's academic research; for example, via the University.

### Funding for Higher Degrees that are not required for the CCT

- a) The CSL budget is generally not an appropriate source of time or funding for higher degrees (including Masters and PhDs) and approval is not usually given. When, exceptionally, a higher degree is a **mandatory** requirement for the CCT then Study Leave time and finance can be considered as a contribution to the necessary costs.
- b) In practice, to achieve this support for a programme, the degree's curriculum must closely match a considerable proportion of the mandatory curriculum. Further, it will be necessary for the programme to objectively demonstrate that the acquisition of these competencies is most efficiently achieved by providing resources for the programme's junior doctors to undertake the degree, rather than to achieve the same outcome by providing resources in support of more traditional opportunities in-programme.

### Overseas Leave

Overseas courses/conferences will not be included on the list of pre-approved courses unless attendance is a curriculum requirement. Consideration may be given to funding the course/conference fees only, if the course is an appropriate aspirational activity in line with a doctor's PDP and has the approval of the TPD or Head of School. Guidance notes for the approval of overseas leave are given in the Guidance for Exception Approvers 2018, available on our [website](#). Study leave days/budgets may not be used for observerships.

### Meetings at which Junior Doctors Present Papers

Junior doctors should be encouraged to present papers at academic and clinical meetings. The decision as to whether associated costs would be considered will depend on whether the meeting concerned is judged by the TPD or Head of School (the exception approver) as relevant to the curriculum and/or an aspirational activity that is beneficial to the junior doctor's development.

## Appeals process

- a) Applicants who wish to appeal against a decision relating to CSL should do so to the Regional Faculty Support Lead (Midlands and East) who will review appeals on an individual basis. All appeals must be in writing.
- b) An appeal against a Study Leave decision is purely a documentary process. The Regional Faculty Support Lead will only consider written evidence, and when presented within six weeks of the decision being appealed against.
- c) Appeals must be emailed to the Regional Faculty Support Lead Gerard O'Reilly through the dedicated CSL mailbox – [CSL.EM@hee.nhs.uk](mailto:CSL.EM@hee.nhs.uk) (quoting the words 'CSL APPEAL' in the subject line).

## Queries

Please address any queries to either your local Trust Study Leave Co-ordinator or to the CSL staff within the Faculty Support Team at HEE-EM.

Contact details for Trust Study Leave Co-ordinators can be found on our website at [https://www.eastmidlandsdeanery.nhs.uk/policies/study\\_leave](https://www.eastmidlandsdeanery.nhs.uk/policies/study_leave).

## Appendix A

### Possible reasons why an application may not proceed as expected

**1) The event does not appear on the approved list**

On the application, the junior doctor should select the option which says they want to apply for something which is not on the list. This will go through as an exception application. Foundation doctors who want to apply for an exception activity should contact their Foundation Programme Director, who will need to [email](#) the CSL staff at HEE-EM with their approval.

**2) There is insufficient money available in the budget**

Due to the technical limitations of the current Intrepid system, all applicants must have a budget assigned. It is anticipated that the assigned budget will normally be sufficient for a year's activities, but if you find that your planned activities exceed your set budget, please contact [CSL.EM@hee.nhs.uk](mailto:CSL.EM@hee.nhs.uk). You can check your assigned budget in the Leave Entitlements section of your Leave Manager account.

The next version of Leave Manager (currently under development) is likely to remove this technical limitation.

**3) There are not enough days remaining**

Leave Manager will only allow junior doctors to submit applications which do not exceed their remaining entitlement. The remaining days must be in the correct category (internal/external) for the event. If there are no days remaining in the correct category the application cannot be submitted. If there are not enough days remaining the number of days being applied for will need to be reduced so that they are within the remaining entitlement.

**4) Application is awaiting a decision**

Junior doctors and relevant approvers will receive email notifications of the decision made at each stage of the approval process. If a junior doctor is waiting for longer than expected they should contact the relevant approver; the pending leave approver can be checked by opening the relevant leave request in the Leave Manager section of their account and scrolling down to the Approvers section. If this does not resolve the issue, please [email](#) the CSL staff at HEE-EM.

**5) The dates of the leave have already passed**

Retrospective applications are not accepted so these applications cannot be made. This will show on Intrepid as there being "no approvers for the post and criteria selected".

**6) The user is not entitled to CSL**

Doctors not in training grades are not entitled to CSL and do not have Leave Manager access. Junior doctors in training are not entitled to CSL post-completion of training, during the Period of Grace or if they go on OOPE, OOPC or OOPR. Junior doctors on OOPT are normally only entitled to CSL for this period if they are occupying a training post on a training programme in our region.

**7) Post information is not correct on Intrepid**

Staff at HEE-EM need to update your record. Please contact the Programmes Team at HEE-EM (see [Appendix E](#)) who can ensure this is resolved.

**8) Leave approvers have not been set up for the post**

This will show as the post being 'Closed'; please contact [CSL.EM@hee.nhs.uk](mailto:CSL.EM@hee.nhs.uk) so that this can be updated.

**9) Exception approver (TPD/Head of School) can't see the leave request.**

There are two possible reasons for this:

1. TPD/Head of School approval is only required for [Exception applications](#); it's not required for Standard applications (i.e. activities from the approved list).
2. The Exception approver (TPD/Head of School) doesn't see leave requests until/unless it's been approved by the rota coordinator/JDA/practice manager/local equivalent. If your TPD/Head of School can't see your Exception request, it's worth checking that it's been approved by the rota coordinator/etc. first.

**10) I think [activity] should be on the approved list.**

The approved activity lists are agreed by the TPD/Head of School for the specialty/school; if there is an activity that you feel should be on the approved list of activities, please contact your TPD/Head of School, who will review this and confirm to the study leave team the specialties/grades for whom the activity should be pre-approved.

Our website ([https://www.eastmidlandsdeanery.nhs.uk/policies/study\\_leave](https://www.eastmidlandsdeanery.nhs.uk/policies/study_leave)) has further FAQs which may help with any queries.

If you are experiencing difficulties and none of the above or on our website apply, please [contact us](#).

## Appendix B

### 2017/18 Entitlements

School	Higher Training			Core Training		
	Internal Days	External Days	Budget	Internal Days	External Days	Budget
Dental	20	10	£500	20	10	£325
GP Boston (GP practices only)	20	10	£500	N/A	N/A	N/A
GP Chesterfield (GP practices only)	20	10	£500	N/A	N/A	N/A
GP Derby (GP practices only)	20	10	£500	N/A	N/A	N/A
GP Lincoln (GP practices only)	20	10	£500	N/A	N/A	N/A
GP LNR (GP practices only)	20	10	£500	N/A	N/A	N/A
GP Nottingham (GP practices only)	20	10	£500	N/A	N/A	N/A
GP Sherwood Forest (GP practices only)	20	10	£500	N/A	N/A	N/A
Public Health	20	10	£500	N/A	N/A	N/A

### Maternity Leave

	Internal Days	External Days	Budget	Comments
Maternity Leave (except Foundation)	0	10	£170	Calculated on pro-rata basis
Maternity Leave (Foundation)	10	0	£0	Calculated on pro-rata basis

## Appendix C

### Authorised costs in addition to course fees

Rates quoted are those published in the [NHS Terms and Conditions of Service](#), which are updated online from time to time.

Allowance	Cost
Overnight allowance (commercial – e.g. B&B/Hotel)	£55.00
Overnight allowance (non-commercial – e.g. staying with friends)	£25.00
Meals allowance (24 hours)	£20.00
Meals allowance (lunch – more than five hours away from base, including the lunchtime period between 12.00-2.00 pm)	£5.00
Meals allowance (evening meal – more than ten hours away from base and return after 7.00 pm)	£15.00

<b>Mileage</b> (using the 'Reserve Rate' quoted in the NHS Terms and Conditions of Service – Table 7, Section 17 – in line with paragraph 17.19 of the same policy located <a href="#">here</a> )	
All travel payable at a single rate	£0.28 per mile

Accurate as of 23/04/2018

## Appendix D

### Contacting HEE East Midlands

All calls: 0300 303 3603, then follow the automated instructions for the appropriate team below

#### CSL queries – Faculty Support Team

CSL is managed through Leave Manager, which system allows you to leave to attend events to support your training. The system is self-service, but if you have any queries, the team can help you.

- [CSL.EM@hee.nhs.uk](mailto:CSL.EM@hee.nhs.uk) – study leave/Leave Manager
  - [https://www.eastmidlandsdeanery.nhs.uk/policies/study\\_leave](https://www.eastmidlandsdeanery.nhs.uk/policies/study_leave)
- [ESD.EM@hee.nhs.uk](mailto:ESD.EM@hee.nhs.uk) – Course Manager

#### Recruitment/rotation queries – Programmes Team

You should contact them if you have any queries about your rotation or if you have anything to tell them that affects your rotation, including (but not limited to) parental leave, compassionate leave, or long-term sick leave (lasting more than 14 **calendar** days), or you want to resign from your programme.

- Foundation: [FoundationProgrammes.EM@hee.nhs.uk](mailto:FoundationProgrammes.EM@hee.nhs.uk)
- General Practice: [GPProgrammes.EM@hee.nhs.uk](mailto:GPProgrammes.EM@hee.nhs.uk)
- Secondary Care: [SpecialtyProgrammes.EM@hee.nhs.uk](mailto:SpecialtyProgrammes.EM@hee.nhs.uk)

#### Less Than Full Time (LTFT) training queries – Programmes Team

If you have (for example) child-caring or other caring responsibilities, health concerns or individual developmental opportunities, you may wish to consider working Less Than Full Time. You should also contact them if you want to change your LTFT percentage.

- [LTFT.EM@hee.nhs.uk](mailto:LTFT.EM@hee.nhs.uk)
  - <https://www.eastmidlandsdeanery.nhs.uk/policies/ltft>

#### Out of Programme (OOP) queries – Programmes Team

If you would like to spend time out of your training programme, whether for clinical training (OOPT), clinical experience (OOPE), research (OOPR) or for a career break (OOPC), you can contact the team to discuss this.

- [OOP.EM@hee.nhs.uk](mailto:OOP.EM@hee.nhs.uk)
  - <https://www.eastmidlandsdeanery.nhs.uk/policies/oop>

#### ePortfolio/ARCP queries – Assessments & Revalidation Team

All doctors on GMC-approved training programmes must be assessed at least annually, in line with GMC requirements. The team arranges the ARCP panel meetings, as well as providing support for the various ePortfolio systems.

- General Practice: [GPAssessments.EM@hee.nhs.uk](mailto:GPAssessments.EM@hee.nhs.uk)
- All other specialties: [Assessments.EM@hee.nhs.uk](mailto:Assessments.EM@hee.nhs.uk)

#### Revalidation queries – Assessments & Revalidation Team

All fully GMC-registered doctors (usually from F2 onwards) are subject to revalidation. If you have any queries about your revalidation, you should contact the team who will be able to help. You should also return your completed Form R Part Bs to the team.

- [Revalidation.EM@hee.nhs.uk](mailto:Revalidation.EM@hee.nhs.uk)
  - <https://www.eastmidlandsdeanery.nhs.uk/policies/revalidation>