Introduction
This document represents the West Midlands Deanery policy on study leave. It will be updated on the web so please refer to the current document. It only applies to junior doctors in Deanery-approved posts. Please check for school specific sections below especially Foundation Trainees. Trainees while ‘out of programme’ are excluded as are LAS but LATs, FTSTAs and trainees in their ‘grace period’ are included.

Study time is integral to the training and education of all Doctors and supported by the Deanery at all levels. All training programmes have formal study times planned in addition to local ‘bleep free’ sessions. Additional leave and funding beyond this is discretionary but commonly supported if educationally appropriate for individual trainees. As such it supports the attainment of required knowledge, skills and behaviours, recorded in the relevant curriculum, that cannot be delivered within the programme and engenders a commitment to lifelong learning and professional development.

Study leave is expensive so in any financially limited environment care must be taken to ensure value for money is obtained and the training is appropriate in content and timing for each trainee. Study leave is in addition to training that is part of induction or a Trust’s mandatory training policy although will usually cover life support training.

Study Leave entitlement
The general entitlement is 1 day per university term time week equating to 30 days per year. A year (or part thereof for pro-rata calculations) will start from a rotation date and cannot be ‘carried over’. This time will include training programme co-ordinated sessions which must be attended for satisfactory ARCP (70% attendance minimum to allow for other leave). The time excludes local ‘bleep free’ teaching. Generally 6 weeks notice is needed and as several people need to sign the form a longer total time is required. It is the trainee’s responsibility to ensure any on call requirements are covered in line with local employer policy. The study leave should always fit a trainee’s personal development plan (PDP) and be agreed with the Educational Supervisor and Training Committee if appropriate. Trainees will be expected to have fully engaged with their Deanery education programme to be eligible for additional study leave. When considering courses, those within the West Midlands will be given priority.

Trainee’s access to study leave will be investigated during Quality Management Reviews with appropriate reports and recommendations.

Study Leave Funding
Nominally £600 per year per trainee in FY2 and above is allocated for study leave. In secondary care this is usually administered by the Postgraduate Office of the Employing LEP under the supervision of the Clinical Tutor. Depending on the training grade a proportion may be ‘top sliced’ to fund training courses targeted toward curriculum delivery. In General Practice the Area Programme Office co-ordinates the process. In some Schools the budget is pooled within a lead Trust supervised by a School Board member to simplify the process and occasionally allow courses costing more...
than £600 to be funded with less available in a subsequent year. However it is rare that £600 per year will be exceeded and unused funds cannot automatically be carried over. Clinical Tutors will not usually refund £600 to every trainee so the Deanery expects any surplus money to be used to support educational activity and occasionally exceed £600 in one year for appropriate educational reasons. The money is not allowable against locum costs.

Only prospective applications will be considered. Full, detailed receipts must always be provided for subsequent reimbursement. Employer criteria will be used for re-imbursement rates with regard to mileage rates and concessionary fare agreements.

Following a Deanery-wide review of study leave funding certain specialties were identified as having specific needs that exceeded £600 but were required to achieve competencies without available alternatives. Specific funds have been identified for this at present, mainly within Medicine but also Obstetrics and Gynaecology ultrasonography training. The funding in these instances is additional to the standard £600. Funds will be released by the Postgraduate Dean on application from the Clinical Tutor. A separate report authored by Kath Sadoli explains the detail which will be under review. A small additional budget is available to the Study Leave Committee for exceptional support but if upholding an appeal funding will usually be expected from the originally requested source.

Taking of other paid employment during study leave is prohibited and could be considered a disciplinary offence.

Academic Trainees
Trainees in ACF and Clinical Lecturer posts will be expected to attend training programme sessions with appropriate re-imbursement as for other trainees. They have the same entitlement as other trainees and additionally have a research focussed NIHR allowance through the University. Appeals for clinical study leave funding will be through the usual LEP or School mechanism and to the Study Leave Committee if appropriate. Research based appeals should be to the University and involve the Associate Dean (Academic Training) if necessary.

LTFTT
The Deanery actively supports less than full time training when it is appropriate. It recognises that study leave can be difficult when training in this way so all Trusts and Schools try to operate flexibly. The same guidelines apply with leave calculated pro-rata. Funding is complex as courses cannot be attended pro-rata. Usually funding will be allocated sensibly understanding that training is prolonged so a pro-rata average of the £600 would be expected over time. Appeals would be through the usual LEP or school-specific processes and to the Study Leave Committee if appropriate.

http://www.westmidlandsdeanery.nhs.uk/Home/LessThanFullTimeTraining(FlexibleTraining).aspx

Maternity Leave
Trainees on maternity leave can attend courses usually classed as study leave with appropriate re-imbursement but must not be mandated to do so through the ARCP process. Study leave entitlement is accrued during maternity leave and on return a flexible approach involving the Educational Supervisor and others as appropriate should plan its use to optimise training and return to clinical work.
**Private Study Leave**
Private study leave will not usually be supported. Experience and training at the workplace is generally considered more effective. This is especially the case for exam preparation for which trainees are encouraged to prepare over the duration of the programme. Clinical Tutors and others including Educational Supervisors have some discretion to grant limited private study leave where circumstances have otherwise made it difficult for a trainee to meet specific aspects of the curriculum. Specific funding would not usually be anticipated. This will never exceed 1 week. If applied for, clear educational objectives should be outlined and a report provided if requested.

**Examination Leave**
It is recognised that examinations are mandatory to progress in medical training. Study leave will usually be granted, if appropriately applied for, for the day of the examination, which will not count toward the 30 days per year. The number of attempts allowed to have such extra study days varies by School but will usually be a maximum of 2. Further allowance will depend on individual trainee circumstances at the discretion of Educational Supervisors, Clinical Tutors and School Boards. Exam fees are not paid and travel is discretionary by School.

**Short rotations**
Some Schools and specialties run rotations of 3 and 6 months. If study leave funding is via the local Clinical Tutor, which is annually co-ordinated, this can cause problems. The annual allowance cannot be exceeded but trainees in this position should negotiate with the Clinical Tutors involved to allow appropriate use of funding. Transfer of funds between LEPs for this purpose has been agreed by the Postgraduate Dean although will not be common practice. The funding Clinical Tutor can invoice the LEP where funding has not been used during that year. Difficulties achieving this, for appropriate requests, can be forwarded to the Study Leave Committee for appeal.

**Appeals against refusal of funding**
The Deanery has a Study Leave Committee chaired by the Associate Dean (Quality) which advises the Postgraduate Board when appropriate. It will receive written appeals using the attached proforma if requested evidence is attached and appeal guidelines relevant to the School followed initially.

**Equality and Diversity Analysis**
The Deanery is increasing its analysis of Equality and Diversity data. Study leave is an important area to consider. Appropriate forms will therefore supplement usual applications intermittently. All data will be anonymised and treated confidentially. This also applies to the appeals process even if forms submitted with the original application.
School Specific Information:

**General Practice:** School administered

Web link: [http://www.westmidlandsdeanery.nhs.uk/GeneralPractice.aspx](http://www.westmidlandsdeanery.nhs.uk/GeneralPractice.aspx)

Study leave includes 15 days for attending the half-day release course (vocational training scheme, VTS). Attendance at the half-day release course is compulsory even when working in secondary care. To allow for other leave 70% pro-rata attendance is expected. Travel expenses for AKT and CSA is approved as is overnight accommodation for CSA if a morning exam. Exam fees are not paid. Study leave and travel expenses are limited to two attempts. The time is not deducted from the 30 days entitlement. Exam preparation courses, including CSA and AKT are only funded if West Midlands Deanery approved courses. Private study may not be granted for exam preparation as personal study time is built in to the GP registrar normal working week within the BMA contract.

Application for study leave funding is described on the GP section of the Deanery website. Study leave is only available for the MRCGP curriculum and must have an identified PDP entry in the trainee eportfolio prior to the study activity, and an appropriate reflective log entry afterwards. Authorisation is always needed from the employer for the leave whether in a hospital or GP post. Appeals against refusal of funding are initially to the Head of School. If this is not satisfactory and a trainee believes they still have justification to appeal then the Deanery Study Leave committee can be approached.

**Medicine:** Administered by local Clinical Tutor


Study leave funding for all levels of medicine trainee is co-ordinated by local Clinical Tutors, but application from ST3 and more senior trainees will also require support from the STC Chair or Programme Director. All the specialties also run their own training programmes. For those trainees dual accrediting in G (I) M plus a specialty the 70% minimum attendance at both speciality and GIM programmes is expected. There are currently some additional Dean’s funds allocated for some specialties to ‘top up’ the £600 available as part of the usual application mechanism where there are particular study leave expense issues. Trainees will be informed of this by the STC Chair. Appeals will be to the Clinical Tutor and then the Study leave Committee if appropriate.

**Surgery:** School administered


Study leave application forms are available from and returned to the Postgraduate office of Birmingham Children’s Hospital with at least 4 weeks notice with evidence of separate agreement for time off work following employing Trust guidelines. The application must be supported by the Educational Supervisor and Training Programme Director. Courses will only be funded if covering ISCP content. Courses outside the West Midlands will only be considered if a suitable alternative is
not available within the West Midlands. Any appeals are initially jointly to the Course Co-ordinator and Head of School via the Birmingham Children’s Hospital and then the Study Leave Committee if appropriate.

ACE: Administered by local Clinical Tutors

Web link: http://www.westmidlandsdeanery.nhs.uk/SpecialtySchools/PostgraduateSchoolofACE.aspx

The School comprises 3 Schools of Anaesthesia plus the specialties of Critical Care Medicine and Emergency Medicine and is responsible for ACCS training. Priority will be given to School/Deanery based educational activity and it would be rare for any similar courses outside the Deanery to be funded. Study leave arrangements are through local Clinical Tutors with local appeal before access to the Study Leave Committee if appropriate.

O&G: O&G: Administered by the Postgraduate School of Obstetrics & Gynaecology

Contact: Julia.arnold@bwhct.nhs.uk

Web link: http://www.westmidlandsdeanery.nhs.uk/SpecialtySchools/PostgraduateSchoolofObstetricsGynaecology.aspx

Trainees in ST1&2 are mandated to attend the PSOGs Programme (see website)
Trainees in ST3-5 are mandated to attend the Symposia Programme (see website)
Trainees in ST6&7 are mandated to attend the Masterclass Conferences (see website)

The Programmes are funded through the Deanery by top-slicing the study leave budget. The remaining monies are used to fund mandatory courses at ST1&2 level and ATSM courses at ST6&7 level. Remaining monies for each year are used to supplement costs of other courses approved by the local College Tutor in O&G.

At present there is an additional Dean’s budget to top up funding of ultrasonography training (see study leave funding on the O&G website)

Appeals are via the Head of School, initially, and to the Study Leave Committee if appropriate.

Paediatrics: School administered

Web link: http://www.westmidlandsdeanery.nhs.uk/SpecialtySchools/PostgraduateSchoolofPaediatrics.aspx

Additional-policy&form:
http://www.westmidlandsdeanery.nhs.uk/Portals/0/Paediatrics/Study%20Leave%20Form%20%20May%202008.pdf

Trainees have 30 days study leave a year which includes the ST4-6 Teaching Programme and one day subspecialty symposia. Only West Midlands Courses are funded. Private Study Leave is not funded. Exam leave is allowed but not funded – more than 2 attempts may be approved if supported by the Educational Supervisor.

The process is co-ordinated by the Postgraduate office of Birmingham Children’s Hospital. The application must be signed by the Educational Supervisor and rota manager. If refused and trainees feel they have a reason to appeal this first goes to the Clinical Tutor at Birmingham Children’s
Hospital then the Paediatric School Board. If it is still refused and the trainee believes they still have grounds to appeal they can apply to the Deanery Study Leave Committee.

**Psychiatry:** Administered via relevant Mental Health Trust

Web link: [http://www.westmidlandsdeanery.nhs.uk/SpecialtySchools/PostgraduateSchoolofPsychiatry.aspx](http://www.westmidlandsdeanery.nhs.uk/SpecialtySchools/PostgraduateSchoolofPsychiatry.aspx)

Core Training CT1-3: There are two core training courses (Keele and Birmingham) one of which all core trainees must attend. This will take all of the 30 days study leave entitlement and the cost is met through the deanery study leave allowance, administered through the Trust in which the trainee is working. Trainees should discuss with their Educational Supervisor or College Tutor any additional training needs or objectives.

Advanced training ST4-6: Each of the six advanced programmes includes specialty specific training days. In some programmes, funding is top sliced to support this part of the programme. There are also advanced generic psychiatry skills training days for all the advanced trainees in each year of training. Trainees are expected to attend these study days as part of their development. With the support of their Clinical Supervisor, Trainees can additionally apply to attend other educational activities within their 30 day allowance. Funding up to the balance of the deanery allowance will be allowed. Applications are made to the Trust where the trainee is working. If any appeals cannot be addressed within the employing Trust then appropriate appeals can be addressed to the Study Leave Committee.

**Pathology:** Administered by local Clinical Tutor

Web link: [http://www.westmidlandsdeanery.nhs.uk/SpecialtySchools/PostgraduateSchoolofPathology.aspx](http://www.westmidlandsdeanery.nhs.uk/SpecialtySchools/PostgraduateSchoolofPathology.aspx)

There are well developed training programmes within each of the disciplines. These training days are mandatory and part of the study leave allocation. Additional study leave and funding arrangements are through the LEP Educational Supervisor and Clinical tutor with appeals to the Clinical Tutor and if appropriate the Study Leave Committee.

Within Chemical Pathology there is at present an additional Dean’s budget to top up funding for specific leave. Within Histopathology £55 is top sliced annually for Regional Cytology training.

**Radiology:** Administered by the Lead Trust for North Staffordshire Rotation and by the Head of School for the Birmingham Rotation


Additional-information: [http://www.westmidlandsdeanery.nhs.uk/SpecialtySchools/PostgraduateSchoolofRadiology/TeachingProgrammesandStudyLeave.aspx](http://www.westmidlandsdeanery.nhs.uk/SpecialtySchools/PostgraduateSchoolofRadiology/TeachingProgrammesandStudyLeave.aspx)

There are weekly training sessions for the first 3 years that count toward the 30 day allowance and are targeted at Parts I and II of the FRCR examinations. The North Staffordshire Programme occurs at the University Hospital of North Staffordshire and the Birmingham Programme usually at City Hospital Birmingham. The lead Trust coordinates Study Leave funding for North Staffordshire Rotation as salaries are also paid from there. The Head of School deals with study leave requests for the Birmingham Rotation, as salaries are paid by individual Trusts. The Clinical Tutors supported by
The Programme Directors co-ordinate the process through the postgraduate department in North Staffordshire Hospital for the North Staffordshire Rotation, and through the postgraduate department at The University Hospital of Coventry and Warwickshire NHS Trust for the Birmingham Rotation. Appeals are initially to those offices and to the Study Leave Committee if appropriate.

**Ophthalmology: School Administered**

The School of Ophthalmology runs a rolling Educational Programme accessible via the link below. These sessions count toward the Study Leave allowance and 70% attendance is mandated before other study leave applications are approved. Authorship (usual first) is required to substantiate conference attendance. Other approval is at the discretion of the School. There is a School-specific study leave application form which should be downloaded from the link below. The process requires 8 weeks notice ahead of multiple agreement needed. The study leave co-ordinator is Ms Si Ruaz, Consultant Ophthalmologist at the Birmingham & Midland Eye Centre. Once approved they are processed centrally for funding through the Postgraduate Centre at University Hospital Coventry & Warwickshire (administrator Ms Janet Porter).

Expenses should be claimed within 4 weeks of study leave taken.


Appeals are initially to the School Study Leave administrator and to the Study leave Committee if appropriate.

**Public Health: School administered.**


The School of Public Health has a West Midlands organised training programme throughout each of the three phases of training. Further information can be found on the link. In the first phase of training ‘knowledge and know how’ StRs without an MPH undertake an MPH as per the curriculum in ST1. During this period study leave permits only the attendance of MPH University modules and 50% of inter-module time to be spent on private study relating to the MPH. Other time is spent in service on a project for the MPH dissertation. Therefore no other flexible study leave is permitted during this period.

Post MPH in ST2, whilst preparing for Part A, Regional Tutorials/Workshops are organised by the Programme. There are the fortnightly Part A learning set meetings and other regional events open to StRs. In ST2 16 days of additional flexible study leave days are permitted (to include any periods of private study leave prior to exams). All flexible study leave must be authorised by the Educational Supervisor and TPD. Bespoke short Part A courses for exams (“Exam Crammer Courses”) outside the Deanery are not supported.

In phase 2 of training, whilst preparing for the Part B ‘show how’ the priority is to be undertaking daily service training and again Part B courses outside the Deanery are not supported. From ST3 onwards (usually corresponding to phase 3 of training) there are post part B events (monthly learning set) and other events e.g. CPD days. In addition there are 21 days of possible study days p.a. available to be applied for using the forms on the website. These must be signed by the Educational Supervisor and sent to the Public Health School Administration at the Deanery for TPD authorisation. Any appeals against the Educational Supervisors decisions go to the Zone Coordinators. Any appeals against that decision go to the Deputy Faculty Advisor (Training) and ultimately to the Deanery Study Leave Committee.
Foundation
Administered by local Clinical Tutor

Web link: http://www.westmidlandsdeanery.nhs.uk/FoundationProgramme.aspx

Study leave is only permitted during the FY2 year and is not available during FY1. Special arrangements can be made for FY1 doctors who wish to arrange career “taster” sessions during the last eight months of their FY1 year. Leave with course fees are available for FY1 trainees to attend ALS training and also (Level 3) Simulation Training if they did not undertake this as part of their undergraduate programme. Leave for Simulation Training and Taster weeks are offered to all FY2 trainees. Leave to sit specialty exams is allowed, but will not be funded, and study leave for exam preparation is not supported. Special cases are at the discretion of the Clinical Tutor but appeals can be made to the relevant Foundation Programme Director or subsequently to the Deanery Study Leave Committee if appropriate.

Dentistry

Arrangements for dental trainees are different and they are encouraged to contact the Postgraduate Dental Dean with any uncertainties but appeals will be reviewed by the Study Leave Committee if appropriate.

Defence Medicine

It has been formally agreed with ‘host’ civilian Deaneries and Foundation Schools that military Trainees are entitled to the same Study Leave as their NHS counterparts. It is understood the entitlement to Study Leave will differ slightly between each Trust and between Specialties/Schools. Authority to attend Study Leave is to be negotiated locally and should include the endorsement of the respective Educational Supervisor. In addition, military trainees must seek appropriate authority from their Commanding Officer and Defence Consultant Advisor. The Defence Deanery (DPMD) holds an “External Training” budget to assist in the cost of Continued Professional Development and will normally fund Study Leave applications which have been appropriately approved. There is no DPMD budget for military Foundation doctors, all training required to complete the Foundation Programme is to be provided by the ‘host’ Trust.

In addition, military Trainees are obliged to attend an amount of mandatory military events per year, for example the Tri-Service Anaesthetics Conference. This obligation is required to reinforce links to maintain the Service morale and ethos essential for military personnel.

Events will differ between Service (Royal Navy, Army and RAF) and between Specialty. It has been agreed with ‘host’ civilian Deaneries and Foundation Schools that military Trainees are permitted to use up to a maximum of seven “Mandatory Military Training” days, in addition to Study Leave entitlement, to attend these events. In every case, applications for Mandatory Military Training days need to be pre-agreed with DPMD.

In the event of an appeal the process used will depend on the issue and will be dealt with by the Clinical Tutor, School or DPMD as appropriate. The Study Leave Committee will be accessible for appeals if they are not specific to the DPMD.
In order for the Study Leave Committee to make an informed decision on your appeal, please will you supply us with the answers to the following questions before the committee considers your appeal?

Name……………………………………………………………………………………………………………………………..
Specialty/School………………………………………………………………………………………………………………
LEP (Trust / Hospital / Practice)……………………………………………………………………………………………
Correspondence
Address…………………………………………………………………………………………………………………………

1. Grade (e.g. FY2, SpR)?
   - Foundation Year Two  ❑
   - Specialty Registrar (SpR)  ❑
   - GP Registrar  ❑
   - Specialist Registrar (StR)  ❑
   - Other (please specify)  ❑

2. What is your year in your particular grade?  [  ]

3. What is your CCT date (StR and SpRs only)?  [  ]

4. Course Details
   Please provide details of the course.

5. Does this have the support of your trainer / educational supervisor?  Yes ❑  No ❑
   If no, why not?
6. Does this course have the support of your Specialty Training Committee or GP Course Organiser?  
   Yes ❑  No ❑

If no, why not?

7. Does this course have the support of your Clinical Tutor?  
   Yes ❑  No ❑

If no, why not?

8. What funding, if any, have you received already for this claim? [£ ]
   Please provide details of how much and from where.

9. Have you appealed through your Clinical Tutor or School?  
   Yes ❑  No ❑

   Please provide details

10. What is the total cost of your claim? [£ ]
    Of this:
    How much is the course fee? [£ ]
    How much is travel and subsistence? [£ ]

11. What is the cost of your claim to the Study Leave Committee? [£ ]

12. What study leave and expenses have you been granted to date this year? [£ ]
   Please give details.

I declare that the information given by me is a true and honest statement of the situation.

Please sign ..........................................................  Date ..........................................................

Please return this completed form, additional papers as required, and your covering letter with a copy of your Personal Development Plan to:
Associate Dean (Quality) currently Dr Russell Smith, C/O Education Development Team, West Midlands Workforce Deanery, St Chad’s Court, 213 Hagley Road, Edgbaston, Birmingham, B15 9RG.

Please also return an Equality and Diversity monitoring form which will be dealt with separately and confidentially by the deanery monitoring team and not seen by the Committee.

Claims will not be considered without all the relevant papers including detail of any appeal to the School or Clinical Tutor.
# Equality and Diversity Monitoring Form

The West Midlands Deanery strives to operate a policy of equality and diversity and not discriminate against any person. The information you provide will be treated in the strictest confidence and is for monitoring purposes only.

*Please note: to make your selection, double click on the box field and select “checked” under default value.*

<table>
<thead>
<tr>
<th>Title:</th>
<th>Surname:</th>
<th>Forenames:</th>
<th>Date of Birth:</th>
<th>GMC No:</th>
</tr>
</thead>
</table>

**Ethnic Origin** (please indicate by a tick in the appropriate box)

- **White**
  - British
  - Irish
  - Any other White background
- **Mixed**
  - White and Black Caribbean
  - White and Black African
  - White and Asian
  - Any other mixed background
- **Black or Black British**
  - Caribbean
  - African
  - Any other Black background

- **Asian or Asian British**
  - Indian
  - Pakistani
- **Other Ethnic groups**
  - Chinese
  - Any other ethnic group
- **Not Stated**
  - I do not wish to disclose my ethnic group

**Gender**: [ ] Male  [ ] Female

**Hours of Post**: [ ] Full Time  [ ] Part Time

**Age Group**

- 16-19
- 20-24
- 25-29
- 30-34
- 35-39
- 40-44
- 45-49
- 50-54
- 55-59
- 60-64
- 65 or over

**Sexual orientation**

Please select that which best describes your sexuality:

- [ ] I do not wish to disclose my sexual orientation
- Lesbian
- Gay
- Bisexual
- Heterosexual

**Religion or Belief**

Please indicate your religion or belief:

- Atheism
- Christianity
- Hinduism
- Islam
- Judaism
- Sikhism
- Other
- I do not wish to disclose my religion/belief

**Transgender**

Do you now present full or part-time in a gender role that differs from the gender assigned to you at birth?

- Yes  [ ]
- No  [ ]

**Marital Status**

- Single  [ ]
- Married/Civil Partnership  [ ]
- Widowed  [ ]
- Common Law Partnership  [ ]
- Divorced  [ ]
- Other  [ ]
Disability
A person has a disability under the Disability Discrimination Act if he/she has a physical or mental impairment which has a substantial and long term adverse effect on his/her ability to carry out normal day to day activities. Long term means has lasted, or is expected to last, for 12 months. Do you consider yourself to be a disabled person?

☐ Yes  ☐ No  ☐ I do not wish to disclose whether or not I have a disability

If answering yes, please give details of your disability below:

- Are you blind or do you have a visual impairment?  ☐
- Do you have learning difficulties?  ☐
- Are you a person with experience of mental health distress?  ☐
- Do you use a hearing aid or communicate using BSL or any other Sign Language?  ☐
- Do you use a walking stick or a wheelchair?  ☐
- Do you have any other medical conditions (e.g. diabetes, epilepsy, Multiple Sclerosis, back problem etc. – please state)?  

Thank you for completing this form