

# Curriculum Study Leave Policy

## HEE East Midlands

Version 202001



# 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 September 2020.

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

## Updates from previous versions

From 2018-1

- Changes to Standard and Exception requests
- International Leave guidelines
- Changes to GP study leave
- Reimbursement of expenses in foreign currency
- Evidence required for reimbursement
- Extended period for claiming expenses
- Accommodation standard rates
- Foundation Junior doctor entitlements and aspirational requests

From 2019-1

- Added/amended website links
- Additional guidance for non-trainee roles involved in CSL.
- Streamlined policy structure and added table of contents

## 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 welcome feedback so if you would 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.

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# The policy

## Introduction

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

HEE East Midlands 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 that are curriculum required for specific grades and specialties. To apply for these, a **Standard** application should be made. For events that recommended or additional to the curriculum, 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 requests only)
5. Notification of outcome
6. After the leave has taken place, junior doctor [claims expenses](#) (if relevant) from [employer](#)

Applications may not always proceed as expected. Please refer to Appendix B for potential reasons for this.

## Course Manager

HEE East Midlands also uses a separate booking system for courses run by/through HEE called **Accent Course Manager** (<https://accent.hicom.co.uk/CourseManager/Live/HEEM/Web/>). This only applies to HEE courses; Royal College courses and local training (among others) will not generally be available through Course Manager. If you have any queries/issues regarding Course Manager, please email [ESD.EM@hee.nhs.uk](mailto:ESD.EM@hee.nhs.uk).

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 Intrepid Leave Manager ([www.intrepidv10.co.uk/HEE](http://www.intrepidv10.co.uk/HEE)).

# Roles in HEE EM study leave

Although the CSL process is centred around junior doctors, support for the process is provided by various stakeholders with different responsibilities. Our website has various pages (linked as appropriate in the below) providing greater resources and guidance.

## Leave Applicants (Trainees)

Leave applicants are responsible for:

- Familiarising themselves with the HEE EM CSL policy and any relevant Trust/Practice policies.
- [Submitting leave requests](#) within an appropriate timeframe (6 weeks+) & including estimated expenses that will cover their needs.
  - [Contacting their local CSL Coordinator/HEE](#) proactively and prospectively if they have any issues doing so or need anything amending.
- Managing their [study leave days](#) and [budget](#) appropriately and requesting changes proactively through the [appropriate route](#) (as per [policy](#)) as necessary.
- Submitting [expenses claims](#) with the required evidence and information in line with their [employer's process](#), and in an appropriate timeframe (within 8 weeks of completing the activity or, exceptionally, within 8 weeks of the leave request being fully approved; whichever is later).

## Rota Approver (Sequence 30)

**HEE's link to the rota**

Rota Approvers (Sequence 30) are responsible for:

- Confirming that a trainee can be released from/is not scheduled for the rota on their requested study leave day/s.
- Confirming any cancelled leave requests.
  - Doing both within an appropriate timeframe (we would suggest within 7 days of receipt).

Unless the Rota Approver is also the trainee's Training Programme Director/Head of School (which is rare), they are not required to assess the educational suitability of an activity. This will either have been done by the School already (and therefore is 'pre-approved' educationally, AKA a **Standard** application), or the TPD/HoS will appear after the Rota Approver in the approval chain (usually at Sequence 35) to review the educational suitability of the application (AKA Exception requests).

## Educational/Exception Approver (Sequence 35)

**HEE's link to the training programme**

Educational/Exception Approvers (Sequence 35) are responsible for:

- Assessing the educational and financial suitability of the request for the individual trainee, considering the availability of alternative comparable activities, equity of access for other trainees, individual progression, stage of training and career aspirations.
- Confirming any cancelled leave requests.
  - Doing both within an appropriate timeframe (we would suggest within 7 days of receipt).

**NOTE:** Exception Approvers do not receive requests for Standard (Curriculum Required) activities; these have been preapproved as part of the required training programme. Leave requests will only progress to the Exception approver once the Exception request has been approved by the Rota Approver.



## CSL Coordinator

### HEE's link to the Trust/Programme Office

Responsibilities include:

- Providing information and guidance at Trust/GP Programme inductions/for new starters regarding local study leave process.
- Providing information and guidance on HEE EM [policies](#) and [systems](#) as well as local processes.
- Processing of expenses (using local Trust processes).
- Providing information/updates where required to HEE EM on Rota Approver (Sequence 30) changes.
- Act as the first point of contact for Leave Applicants (Trainees) locally.
- For Primary Care, CSL Coordinators (ie Programme Managers) will also act as approvers at Sequence 5.

### Processing expenses

Local CSL Coordinators are responsible for processing expenses and marking them as approved (**Passed for Payment**) on Intrepid.

1. Log into [Intrepid v10](#) and locate the trainee record. Go to the Education/Leave tab and find the study leave record that matches the claim form being processed.
2. Check that the leave request is authorised (**Authorised: Yes**). This can be done from the Leave History page (a), or once you have opened the leave request (b).

LEAVE HISTORY						
	<a href="#">Start date</a>	<a href="#">End date</a>	<a href="#">Leave type</a>	<a href="#">Internal/External</a>	<a href="#">Days</a>	<a href="#">Authorised</a>
➔	05/02/2020	06/02/2020	Study	Internal	2.	Yes
➔	22/01/2020	22/01/2020	Study	External	1.	Yes
➔	06/12/2019	07/12/2019	Exam	External	1.	Yes

a.

Exp. claim rcvd:

**Authorised:**

Auth. type:

Course topic:

b.

If the request has not been authorised, please follow the guidance below (“What if the leave request has not been approved but the trainee submits a claim?”)

**NOTE:** Any expenses processed without the leave being approved will not be funded by HEE.

3. Scroll to the **Leave Expenses** section. There will be a separate entry for each expense type.  
**NOTE:** Different expenses types (e.g. Fees, Subsistence – Accommodation, Travel – Mileage) should be recorded as distinct rows. If all expenses appear to be grouped under a single expense record, please contact HEE with details of the claim for advice.
4. Click on the arrow at the left-hand side of the relevant expense record.
5. Check that the amount of the claim doesn't exceed either the amount approved (Estimated Cost), or the remaining budget (under **Entitlements (Leave)** on the left-hand side) and is in line with the authorised expenses and rates set out in the CSL policy.

6. Complete the following fields
  - **Claim Amount** (the amount being paid to the trainee. This should not exceed the Estimated Cost originally by the trainee).
  - **Actual Cost** (the actual cost incurred by the trainee from the receipts. HEE will use this for reporting and monitoring purposes)
  - **Financial year** (the current financial year)
7. **Tick the Authorised** box. This will automatically populate **Passed for Payment** with today's date; please wait for it to do so.
8. Record any notes as appropriate.
9. Click **Save**. Repeat as necessary for any other expense types.
10. For any estimated costs not being claimed by the trainee, click on the arrow at the left-hand side of the relevant expense record, complete both **Actual Cost** and **Claim Amount** with 0, and click **Save**. This will release the funds back to the trainee's budget entitlement.

## HEE Study Leave Team (East Midlands)

Our responsibilities include, but are not limited to:

- Policy updates – regular communication with CSL Coordinators and Medical Education Managers.
- Provision of study leave funding.
- Provision and maintenance of a study leave recording system.
- Provide information and guidance at School/Programme inductions/for new starters regarding the overall study leave process.
- Support complex/technical queries and provide support/authorisation/ratification for CSL Coordinators as appropriate.
- Encourage trainees to proactively utilise study leave entitlements throughout the academic year.

HEE also includes other teams responsible for other aspects of junior doctor training, such as placement details (Programmes Team). You can find contact details for other HEE Teams in [Appendix A – Contacting HEE East Midlands](#) or on our [Getting Support](#) page.

### What don't we do

Although we receive a large number of queries that we can help with, anything we receive relating to the below will be redirected to the appropriate person/team.

- Process study leave expenses (except for Public Health, for whom we are doing so temporarily) – this is done by [CSL Coordinator](#).
- Support Course Manager
  - This is a separate service to book **places** on courses, rather than booking study leave. You can book your course places here: <https://accent.hicom.co.uk/CourseManager/Live/HEEM/Web/>
  - You can find more information and support on the Faculty Support Team's dedicated webpage here: [www.eastmidlandsdeanery.nhs.uk/faculty/support/CourseManager](http://www.eastmidlandsdeanery.nhs.uk/faculty/support/CourseManager)
- Approve leave requests - this is done by [Rota Approver](#) and (if applicable) [Educational/Exception Approver](#)
- Manage placements – this is managed by HEE's Programmes Team:
  - For Primary Care: [GPPprogrammes.EM@hee.nhs.uk](mailto:GPPprogrammes.EM@hee.nhs.uk)
  - For Foundation training: [FoundationProgrammes.EM@hee.nhs.uk](mailto:FoundationProgrammes.EM@hee.nhs.uk)
  - For all other specialties: [SpecialtyProgrammes.EM@hee.nhs.uk](mailto:SpecialtyProgrammes.EM@hee.nhs.uk)
  - If your site and specialty are correct, but you feel that your approvers are not, please contact [CSL.EM@hee.nhs.uk](mailto:CSL.EM@hee.nhs.uk)



# Types of Study Leave

Study leave is divided into two parts: Internal and External. Please see [Appendix C – current FTE entitlements](#) for allocations for each School. 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, Examination and International Leave)

External leave is for events provided outside the region and/or programme. It also includes Private Study Leave and Exam Leave, as well as any Exception requests.

### Private Leave

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.

**NOTE:** Because Private leave is only used for personal exam preparation, expenses **cannot** be added to private leave requests. Requests for activities incurring costs must be submitted as Study leave requests, even when a day of study leave may not be required (see [Study leave on non-working days](#)).

In GP training programmes, the maximum Private Study Leave Entitlement is 2 days preparation for AKT, 1 day for CSA preparation. Further guidelines on GP Study leave can be found in [Appendix D – Study leave for GP Trainees \(general principles\)](#).

### Examination Leave

- Examination leave can be given for examinations that are part of the structured training programme and necessary for the acquisition of a CCT.
- Examination leave can only be approved with pay and expenses (not including professional fees) within the United Kingdom.
- 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.
- Professional examination fees are never reimbursed.

## Exception requests

Every year, all HEE training programmes will be asked to confirm a set of 'Standard' activities; these activities will generally be curricular requirements, and represent those activities which junior doctors on that trainee programme can apply for and only require approval of the time off (through the rota coordinator or local equivalent).

However, junior doctors may still apply for activities that are not on the list of standard activities; these are called 'Exception' requests. These requests, once submitted, will initially require approval by the rota coordinator or local equivalent. Once the time off has been approved, the request will be escalated to 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.

To submit an Exception request, applicants should check the box that says **The event I wish to apply for is not on the approved list above. I therefore wish to apply for an Exception Application**. The page will then refresh, and the full list of approved/suggested activities will appear. If there is not an appropriate activity in this drop-down, select **Other**, and complete the **Exception course title** box that appears.

## International study leave

Overseas courses/conferences will not be included on the list of pre-approved courses unless attendance is an explicit curriculum requirement.

Consideration may be given to funding for international activities, if the course/conference is an appropriate aspirational activity in line with a doctor's PDP and has the approval of the TPD or Head of School. For approved international study leave applications, HEE will consider funding either the full cost of the course/conference fees or the full cost of economy travel and accommodation; whichever is the lower amount.

The course/conference must provide a clearly stated curriculum outcome. A full program should be provided. A report recovering the entirety of the leave may be requested after attendance. Any contribution to funding of such leave will need the prior approval of the HEE local Postgraduate Dean. If further periods of international study leave are required this will be considered on a case by case basis by the Postgraduate Dean, and budget allowing. All requests must be submitted prospectively through the form on our website:

[eastmidlandsdeanery.nhs.uk/policies/study\\_leave/International\\_Leave\\_and\\_Budget\\_Increases](http://eastmidlandsdeanery.nhs.uk/policies/study_leave/International_Leave_and_Budget_Increases)

As part of the approvals process, requests to attend overseas study courses/conferences will only be considered in very exceptional circumstances. Such circumstances include:

- for the presentation of significant research findings from within an NIHR recognised academic clinical fellowship or clinical lectureship
- for the presentation of research undertaken as part of a clinical training programme
- where the training course is not available in the UK
- where the course or activity is part of the college curriculum or guidelines on required training
- where the course is set out as a mandatory requirement of college training to reach the required qualification to practice

For international study leave requests where the individual will be presenting, such applications will normally take priority.

Should the request be approved, expenses would be supported as though it is a UK-based activity, ie the following costs can be claimed:

COST	DETAILS
Course/conference fee	Does not include printing costs, publication costs or abstract submission costs where separate to the conference fees.
Overnight accommodation:	In line with NHS Terms & Conditions of Service rates specified in the Expense rates section
Subsistence (food)	In line with NHS Terms & Conditions of Service rates specified in the Expense rates section
Travel (mileage)	From home to and from point of UK exit/entry, in line with NHS Terms & Conditions of Service rates specified in the Expense rates section
Travel (public transport)	From home to and from point of UK exit/entry

As with all expenses claims, receipts must be provided for all expenses (with the exception of non-commercial accommodation).

A report covering the entirety of the leave may be requested from the doctor in training after attendance.

Generally, only one international conference/meeting, providing all other curriculum requirements are met, will be considered for each doctor in training for any one programme, which can be defined as Foundation, Core, Higher or otherwise every three years (so as not to disadvantage doctors on a run-through programme). If further periods of international study leave are required this will be considered on a case by case basis by the Postgraduate Dean, and budget allowing.

# Study Leave Entitlements

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. Unused study leave days cannot be carried forward to the next leave year.

## Leaving/completing training

Entitlement to CSL ends once a junior doctor leaves a training programme, including following successful completion (CCT). Junior doctors are not entitled to study leave from HEE during their Period of Grace; this should be requested and managed in line with the employing Trust's process.

## Maternity leave

Junior doctors on maternity leave should not be expected to attend study leave activities, but will receive a reduced entitlement for this period to cover limited activities (please see Maternity Leave in Appendix C). This can be expanded on request, but doctors returning from maternity leave may also want to consider accessing the Supported Return to Training (SuppoRTT) programme for additional support; further information can be found on our website:

[www.eastmidlandsdeanery.nhs.uk/Trainee/SuppoRTT](http://www.eastmidlandsdeanery.nhs.uk/Trainee/SuppoRTT)

## Study leave on non-working days

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.

## Out of programme (OOP)

Junior doctors on Out of Programme Experience (OOPE), Out of Programme Research (OOPR), Out of Programme Pause (OOPP) or Out of Programme Career Break (OOPC) are not entitled to CSL for the period they are out of programme.

Where a junior doctor chooses to take study leave while OOPT, that individual would then not be eligible to apply for, and have funded, that same element again upon re-joining their training programme.

For junior doctors on Out of Programme Training (OOPT), the base local office will be responsible for approving the study leave and funding/reimbursing the associated study budget.

## Academic Training

Only applications related to postgraduate clinical training should be made using Leave Manager.

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.

## Leave Manager budgets

From April 2018, as part of HEE's [Enhancing Junior Doctors' Working Lives programme](#), we have moved away from a 'notional individual annual allocation' of study leave funding, with the new system supporting all elements of the delivery of all junior doctors' curriculum on approved secondary care sector training programmes, including all trust-funded posts, and discretionary courses that add value to the individual and support the wider system.

Our heads of schools and training programme directors monitor and evaluate the range of funded educational activities undertaken by junior doctors, to ensure that it is fit for purpose, providing quality and value for money. To support this in the East Midlands, an initial budget of £1000 is made available to all eligible doctors' Leave Manager accounts each training year, as this is likely to exceed most doctors' requirements. If you require an increase to this budget, please submit your request prospectively through the form on our website:

[eastmidlandsdeanery.nhs.uk/policies/study\\_leave/International Leave and Budget Increases](http://eastmidlandsdeanery.nhs.uk/policies/study_leave/International_Leave_and_Budget_Increases)

Your request will then be reviewed by your Head of School, who will confirm if they are happy to support your requested budget increase. Depending on the amount requested, additional approval may be sought from the Postgraduate Dean.

Those on Public Health, Dental or GP training programmes receive slightly different financial entitlements; please see [Appendix C – current FTE entitlements](#). Foundation Year Two doctors can apply for one aspirational activity with a study leave budget of up to £300; this must be approved by FTPD on Leave Manager prior to attendance. If the aspirational request requires more than 1 study leave day, please contact [CSL.EM@hee.nhs.uk](mailto:CSL.EM@hee.nhs.uk) prior to submitting the request. Foundation Year One doctors do not receive a financial entitlement. See Foundation CPD Guidance for more detail; this is available on our website:

[www.eastmidlandsdeanery.nhs.uk/policies/study\\_leave/ResourcesGuidance](http://www.eastmidlandsdeanery.nhs.uk/policies/study_leave/ResourcesGuidance)



## Applying for study leave

Where a course is offered by HEE/a HEE East Midlands School (eg 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.

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.

All CSL activities for which you want to use Study Leave days or budget must be applied for through Intrepid Leave Manager prospectively, including any appropriate expenses, and should generally be submitted on Leave Manager at least six weeks before the period of leave; this includes any application for study leave time only, or if you only wish to claim expenses (see Study leave on non-working days). All relevant expenses need to be listed separately in the request (course fee, public travel, mileage, accommodation). Where travel in the morning is not possible to the venue of an event due to an early start time and/or travel arrangement, HEE will support travel the day before the event (days and expenses)

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 may 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 may not have been 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)

## How to claim expenses

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 eight weeks of the leave being completed. Late claims will not be reimbursed unless accompanied by a letter setting out the exceptional circumstance that led to the delay, and may be subject to additional review by HEE.

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 Study leave on non-working 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 ([CSL.EM@hee.nhs.uk](mailto:CSL.EM@hee.nhs.uk)) 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.

Evidence of attendance, such as a certificate of attendance and evidence of approved expenses, such as receipts or bank statements, are mandatory for making a claim. For any expenses paid in a foreign currency, evidence must be provided of the exchange rate applied at the time of payment, such as a bank statement showing the GBP cost.

Junior doctors are responsible for ensuring that they have followed the appropriate GP Programme Office/Trust process for submitting expenses, as well as for including all necessary information and evidence. Trusts should pay all reasonable expenses approved on Leave Manager, in line with applicable rates, without exceeding the estimated amount submitted and approved on Leave Manager.

In the event where a course/activity has been cancelled by the provider, HEE cannot refund any fees or expenses paid.

- **NOTE:** For events cancelled due to COVID-19, you should endeavour to obtain a refund for any expenses that have been pre-booked from either the event provider or your bank/credit card company as appropriate.
- If you are unable to obtain a refund through the above route/s for an activity cancelled due to COVID, please submit your claim and receipts to your Trust/Programme Office via the usual study leave claim process. As you will be unable to provide proof of attendance, please instead provide evidence of the cancellation of the event, and that the expense is non-refundable.
- See [www.eastmidlandsdeanery.nhs.uk/policies/study\\_leave/COVID19](http://www.eastmidlandsdeanery.nhs.uk/policies/study_leave/COVID19) for more information on CSL and COVID in the East Midlands.

## Expense rates

Assuming that the activity is approved for funding, either by being on the School's approved list for the stage of training, or by the Exception request being approved by the TPD/HOS as appropriate, HEE will fund the course/conference fees.

In addition, the following expenses will also be supported at the relevant rate:

Allowance	Cost
Overnight allowance (commercial – eg B&B/Hotel)	£120.00 £150.00 - (within London)
Overnight allowance (non-commercial – eg staying with friends)	£25.00
Meals allowance (maximum per 24-hour period)	£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
Parking – please ensure that you opt for the most cost-effective option available (ie long/short stay).	Funded

<b>Public Transport</b>	
Standard class rates, unless it can be demonstrated that a higher class (eg first class) was the cheaper option.	Funded

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

Accurate as of 10 August 2020.

# What can CSL (time or expenses) not be used for?

## Study leave

- Leave for Mandatory Teaching expected of your employer (statutory and mandatory training)
  - Qualifications such as ALS/ATLS/APLS required for clinical practice by your employer unless they are also an explicit requirement for your current curriculum.
- Interview Leave, including GP Selection Centre, Specialty Training or Consultant interviews.
  - Junior doctors should seek advice from their Trust about applying for Professional Leave in these situations (local arrangements may apply).
- Ceremonies
- Employer-related leave
- Observerships/clinical attachments
- Higher Degrees, including PGCerts, Masters, and PhDs, not required for CCT
  - 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.
  - HEE funding of postgraduate diplomas and degrees must be rationalised by an established link to the curriculum and a commitment that the qualification will be integral to the doctor's future career.
  - 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.
- Meetings to 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.

## Expenses

Inappropriate costs for study leave, which will not be funded, include:

- Retrospective applications.
- Examination fees.
- Membership/subscription fees.
- Credit card charges.
- Conventions.
- Ceremonies.
- Equipment, incl. books.
- Publication, abstract submission or printing costs.
- Visas or application fees.
- Any costs where evidence of payment cannot be provided (ie receipts/bank statements).
- Costs that do not relate to the period of study leave.
- Expenses in excess of the specified rates and/or that were not estimated on Intrepid prior to the activity.

## Queries

Please address any queries to either your local Trust CSL Coordinator or to the HEE Study Leave Team (East Midlands). Many issues can be resolved by contacting us as soon as they come up, so please don't hesitate to get in touch!

Contact details for Trust Study Leave Co-ordinators can be found on our website at [www.eastmidlandsdeanery.nhs.uk/policies/study\\_leave/GettingSupport](http://www.eastmidlandsdeanery.nhs.uk/policies/study_leave/GettingSupport). You can also find information and contact details for other HEE East Midlands teams on the same page.

## Appeals process

In the majority of cases, issues can be resolved by reference to the policy, or with the support of the CSL Coordinators in Trusts and the Study Leave Support staff at HEE, so if you're having issues, we would encourage you to try those routes first.

However, if you still 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.

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.

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).



# Appendix A – 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: [GPPprogrammes.EM@hee.nhs.uk](mailto:GPPprogrammes.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>

## Appendix B – FAQs

### The event I want to apply for 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 see the below FAQ

### There are not enough days remaining

Leave Manager will only allow junior doctors to submit applications which do not exceed their remaining entitlement (see [Appendix C – current FTE entitlements](#) for Full Time Equivalent entitlements). 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.

For doctors in Foundation Training Year 2, there is facility to use some of your Taster Leave towards attending Exception activities (i.e. activities outside of your curriculum requirements), including courses and specialty exams. If this applies to you, you must discuss your request with your Educational Supervisor and submit an exception request through Leave Manager. This will then be approved by your FTPD or Foundation Programme Co-ordinator on their behalf.

Please ensure that approval from your FTPD is gained prior to attending the event. If you would like to use more than 1 study leave day for this, please contact [CSL.EM@hee.nhs.uk](mailto:CSL.EM@hee.nhs.uk) prior to submitting your request. Neither foundation school will grant study (taster) leave for exam preparation. See **Foundation CPD Guidance** for more detail on our website: [www.eastmidlandsdeanery.nhs.uk/policies/study\\_leave/ResourcesGuidance](http://www.eastmidlandsdeanery.nhs.uk/policies/study_leave/ResourcesGuidance)

### There is insufficient money available in the budget

Junior doctors eligible for the 'uncapped' budget will have a budget entitlement of £1000 set on Intrepid. 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 submit a request on our website for a budget increase:

[eastmidlandsdeanery.nhs.uk/policies/study\\_leave/International\\_Leave\\_and\\_Budget\\_Increases](http://eastmidlandsdeanery.nhs.uk/policies/study_leave/International_Leave_and_Budget_Increases)

This will then be reviewed by your Head of School/the Postgraduate Dean to ensure that it is fit for purpose, providing quality and value for money.

You can check your assigned budget in the Leave Entitlements section of your Leave Manager account:

[www.intrepidv10.co.uk/HEE/sys\\_Pages/LeaveManagerApplicant/StaffEntitlementList.aspx](http://www.intrepidv10.co.uk/HEE/sys_Pages/LeaveManagerApplicant/StaffEntitlementList.aspx)

### Application doesn't yet show as Approved

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 HEE EM's CSL staff ([CSL.EM@hee.nhs.uk](mailto:CSL.EM@hee.nhs.uk)).

## **Expenses don't yet show as Approved**

Expenses are marked as approved when the claim has been submitted to the junior doctor's employer, and have been approved for payment. No prospective authorisation is required for individual expenses.

## **The applicant is on the MTI scheme**

Please refer to our website ([www.eastmidlandsdeanery.nhs.uk/policies/study\\_leave/MTI](http://www.eastmidlandsdeanery.nhs.uk/policies/study_leave/MTI)) for up to date guidance.

## **Intrepid says that there are "no approvers for the post and criteria selected"**

This error generally means that the dates of the leave have already passed. Retrospective applications are not permitted so these applications cannot be made. Please check the application date/s for typos, and contact [CSL.EM@hee.nhs.uk](mailto:CSL.EM@hee.nhs.uk) if you believe you are receiving this message in error.

## **The applicant does not have an account**

Doctors appointed to substantive HEE training programmes 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, OOPP or OOPR. Junior doctors in OOPT placements within HEE, but outside of the East Midlands, should contact [CSL.EM@hee.nhs.uk](mailto:CSL.EM@hee.nhs.uk) for further advice.

## **Post information is not correct/missing on Intrepid**

Staff at HEE-EM need to update the training record. Please contact the Programmes Team at HEE-EM (see [Appendix A – Contacting HEE East Midlands](#)) who can ensure this is resolved.

## **Post shows as 'Closed' on Leave Manager**

This generally means that leave approvers have not been set up for the post, usually because it is a new placement number. Please contact [CSL.EM@hee.nhs.uk](mailto:CSL.EM@hee.nhs.uk) so that this can be updated.

## **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 requests; it's not required for Standard applications (i.e. curriculum required activities).
2. The Exception approver (TPD/Head of School) doesn't see leave requests until/unless it's been approved by the Rota Approver (Sequence 30). 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.

## **I think that [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.

## Appendix C – current FTE entitlements

**NOTE:** Junior doctors who work part-time, or who join or leave/complete the programme/clinical training in the middle of an academic year will have a pro-rata entitlement based on the below. Individual entitlements can be checked in the **Leave Entitlement** section of an individual's Intrepid account:

[www.intrepidv10.co.uk/HEE/sys\\_Pages/LeaveManagerApplicant/StaffEntitlementList.aspx](http://www.intrepidv10.co.uk/HEE/sys_Pages/LeaveManagerApplicant/StaffEntitlementList.aspx)

HEE review these calculations regularly, but if you feel that your entitlement is incorrect, please email [CSL.EM@hee.nhs.uk](mailto:CSL.EM@hee.nhs.uk).

Where the budget is listed as N/A, the rules around uncapped Leave Manager budgets applies.

School	Higher Training			Core Training		
	Internal Days	External Days	Budget	Internal Days	External Days	Budget
Anaesthetics	20	10	N/A	20	10	N/A
Dental	20	10	£500	20	10	£325
Emergency Medicine (includes all ACCS)	15	15	N/A	15	15	N/A
Primary Care (GP practices only)	20	10	£400	N/A	N/A	N/A
Medicine (all except specialties below)	20	10	N/A	15	15	N/A
Medicine: Acute Internal Medicine	15	15	N/A	N/A	N/A	N/A
Medicine: Allergy	8	22	N/A	N/A	N/A	N/A
Medicine: Cardiology	6	24	N/A	N/A	N/A	N/A
Medicine: Clinical Immunology	10	20	N/A	N/A	N/A	N/A
Medicine: Dermatology	10	15	N/A	N/A	N/A	N/A
Medicine: Gastroenterology	15	15	N/A	N/A	N/A	N/A
Medicine: Genito-Urinary Medicine	10	20	N/A	N/A	N/A	N/A
Medicine: Geriatric Medicine	15	15	N/A	N/A	N/A	N/A
Medicine: Neurology	11	19	N/A	N/A	N/A	N/A
Medicine: Palliative Medicine	15	15	N/A	N/A	N/A	N/A
Medicine: Respiratory	15	15	N/A	N/A	N/A	N/A

School	Higher Training			Core Training		
	Internal Days	External Days	Budget	Internal Days	External Days	Budget
Obstetrics and Gynaecology	ST1-5: 15 ST6-8: 5	ST1-5: 15 ST6-8: 25	N/A	N/A	N/A	N/A
Paediatrics	20	10	N/A	N/A	N/A	N/A
Pathology (all except specialties below)	10	20	N/A	N/A	N/A	N/A
Pathology: Combined Infection Training	ST3+4: 15 ST5: 20	ST3+4: 15 ST5: 10	N/A	N/A	N/A	N/A
Pathology: Medical Microbiology / Infectious Diseases	15	15	N/A	N/A	N/A	N/A
Public Health	20	10	£500	N/A	N/A	N/A
Psychiatry	20	10	N/A	CT1+2: 0 CT3: 20	CT1+2: 8 CT3: 10	N/A
Radiology	ST1-3: 20 ST4-6: 15	ST1-3: 10 ST4-6: 15	N/A	N/A	N/A	N/A
Surgery (all except specialties below)	20	10	N/A	20	10	N/A
Surgery: OMFS	15	15	N/A	N/A	N/A	N/A
Surgery: Otolaryngology (ENT)	10	20	N/A	N/A	N/A	N/A

## Foundation Junior doctors

Training year	Internal Days	External Days	Budget	Comments
Foundation Year 1	9	0	£0	Includes up to 5 for taster days, 1 Acute SIM, 1 End of Life care, 1 Careers (Windmills)
Foundation Year 2	17	1	£300 (only applies to aspirational requests)	Also applicable to Academic F2

See [Foundation CPD Guidance](#) for more detail.

## Maternity Leave

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



## Appendix D – Study leave for GP Trainees (general principles)

This appendix describes specific principles for study leave as they apply to GP Trainees. It should be read in conjunction with HEEs overview of study leave arrangements

- Doctors in General Practice specialty training should discuss their progress, aspirations and intentions regularly with their Educational and Clinical Supervisors. This should entail discussions in general terms at every Educational Supervision meeting, with more detailed discussions with their CS at the start and of every placement. These discussions should be reflected in their PDP.
- Attendance at the School's Regional Teaching courses and educational supervision with their GP trainer are **mandatory** (ref GMC Promoting Excellence standard R3.12: Doctors in training must be able to take study leave appropriate to their curriculum or training programme, to the maximum time permitted in their terms and conditions of service).
- At all times (with the sole exception of taking an exam or when so advised by a TPD), the Regional Teaching Course provided by the local School should take precedence over other study leave
- As the best preparation for both AKT and CSA is consulting and reflecting on casework, the School does not encourage the taking of private study leave for exam preparation.
- In general doctors in GP training should be meeting core curriculum requirements before considering discretionary enhancement activity.
- GP Trainees who are progressing satisfactorily may wish to develop an interest in a particular specialty and undertake a limited amount of training to that effect, but they should ensure that this does not hinder their progress or detract from their study of the core GP Curriculum.