

STUDY AND PROFESSIONAL LEAVE POLICY

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CITY HOSPITALS SUNDERLAND NHS FOUNDATION TRUST

DOCUMENT APPROVAL PROFORMA

Policy Title: Study and Professional Leave Policy

Policy Number: HR29.SPL.V4.0

Name of Author: Dennis Little, Workforce Development and Training Manager

Name of Sponsor: Kath Griffin, Director of Human Resources

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Risk management	<input type="checkbox"/>
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Mental Health Act	<input type="checkbox"/>
Human Resource	X
Control of infection	<input type="checkbox"/>
Drugs policy	<input type="checkbox"/>
Other	<input type="checkbox"/>

Equality Impact Assessment: If this policy has a potential discriminatory impact please record below the person who has informed and involved the sponsor:

Name:

Title:

Date:

NB: It is the sponsor's responsibility to submit the policy through the CHS approval route.

Checklist for the review and approval of the policy

	Is the policy compliant with:	Yes/No	Comments
	Corporate style	Yes	
	Format including duties,	Yes	
	Content; intended outcomes clearly described	Yes	
	Evidence base; key references included and cited in full	Yes	

	Associated documentation recorded	Yes	
	Review/consultation process: List of groups/committees included with the policy	Yes	
	Appropriate stakeholders consulted	Yes	
	Approval: Staff side committee (if appropriate)		
	Dissemination & implementation: appropriately described	Yes	
	Training: requirements included (where appropriate)	Yes	
	Document control: table updated appropriately	Yes	
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Committee Approval

Committee which forms the approval process: Policy Committee

Date of approval:

Signature of Chair of Committee, including approval: Mike Davison

1. INTRODUCTION

City Hospitals Sunderland NHS Foundation Trust (the Trust), aims to provide a flexible means of supporting the continuing development of staff, relevant to their role or to support an agreed development plan / their continuing development.

The policy contains details of how an employee applies for study leave and factors that managers need to consider in deciding whether to approve the application and what support can be offered.

Where study / training is being partly or wholly funded by the Trust or other NHS funding, the policy details the contract between it and the employee and the scale of financial recovery that will apply, should the employee fail to complete the programme without the Trust's agreement, or leave the Trust's employment within the timeframes described in **Appendix 1** of this policy, after completing the training.

It is recognised that some staff may need support with the process of applying for study leave (whether it be literacy, understanding or other types of support). Their manager or other employee, as agreed with the individual, will support employees with such needs on a one-to-one basis. All support given will be in confidence.

2. PURPOSE AND SCOPE

The purpose of this policy is to set out a framework for study leave applications and the approval process in relation to training and development.

This policy applies to all Trust staff, except junior doctors in training.

Additional provisions based on the Terms and Conditions Medical and Dental staff, are outlined in **Appendix 2**.

The study leave application process for Junior Doctors, whose training is managed by the Medical Education Department in conjunction with the Northern Deanery, is outlined in **Appendix 3**.

3. DUTIES

3.1 Board of Directors

The Board of Directors is responsible for approving a framework to support the workforce in acquiring the necessary skills and knowledge to comply with all relevant legislation; guidelines and best practice standards in-patient care delivery.

3.2 Chief Executive

The Chief Executive has ultimate responsibility, with delegated responsibility to Executive Committee Members, for ensuring that the workforce is competent, capable and adopts safe working practices.

3.3 Director of Corporate Affairs

The Director of Corporate Affairs is responsible for maintaining the Trust's Register of Interests and will, where an individual declares a relevant interest in relation to study leave, determine whether this meets the criteria set out in the Trust's Standards of Business Conduct Policy.

3.3 Divisional General Managers/Clinical Directors

Divisional General Managers and Clinical Directors have responsibility for study leave (and official duty leave arrangements for medical staff) for staff employed by the Trust within directorates.

3.4 Directorate Managers/Heads of Services/Departmental Heads

Heads of Services (including Divisional General Managers/Directorate Managers) are responsible for ensuring that Line Managers in their directorates carry out annual appraisals to identify learning and development requirements for their staff and apply the study leave policy equitably.

3.5 Line Managers

Line managers are responsible for:

- Ensuring all staff have an annual appraisal and identifying any learning and development needs.
- Ensuring all staff are up to date with their mandatory training **before** approving study leave for other development programmes.
- Ensuring that learning/knowledge/skills gained through study leave is applied in the workplace and shared with other members of the team as appropriate.
- Making decisions in relation to study leave and funding in a fair and consistent way thereby demonstrating equity / non-discriminatory practice.
- Explaining to staff the reason why study leave cannot be approved, where this is the case.
- Discussing with employees their progress on the programme and resolving difficulties in order to avoid any employee failing to complete a programme successfully
- Verifying qualifications by viewing certificates / results from awarding bodies and recording these in the employee's ESR learning record.
- Initiating recovery of financial assistance from staff who leave the Trust's employment within the timeframes in **Appendix 1** or withdraw from and/or fail to complete a funded programme.

3.6 Charitable Funds Accountant

The Charitable Funds Accountant is responsible for advising Trust Fund Managers on whether any proposed use of Charitable Funds meets the Charities' Commission criteria.

3.7 Employees

Employees are responsible for: -

- Attending their annual appraisal and identifying / agreeing a Personal Development Plan.
- Applying for study leave in accordance with this policy – see **Appendix 4**.
- Completing any education and training which is funded either directly or indirectly by the Trust, including CPD modules available to registered non-medical healthcare professionals through the Health Education England North East (HEENE) contract. Failure to complete a funded course may result in recovery of financial assistance.
- Completing a Learning Agreement where the employee undertakes a programme, which is wholly or part-funded by the NHS. This includes the Continuing Workforce Development (CWD) modules available to registered non-medical healthcare professionals through the HEENE contract.
- Keeping their manager informed of progress when undertaking a programme of study that is being supported directly or indirectly by the Trust, and flagging any difficulties which may prevent them completing a programme.
- Attending any event for which study leave has been authorised.
- Resubmitting assignments where requested in order to achieve successful completion of a programme
- Sharing learning gained from training / study leave with colleagues as requested by the line manager.
- Requesting / recording study / training leave in ESR.
- Providing documentary evidence (e.g. certificate / exam results) to their manager to enable qualifications to be recorded in ESR.
- Attending any study event, which is authorised and funded by the Trust and only claiming expenses that have been approved in advance / in line with actual costs incurred.

4. DEFINITIONS

4.1 Study Leave

Study leave is defined as any period of time when a staff member is absent from their normal working activities for the purpose of acquiring knowledge and/or skills which will be applied in the workplace and which links to their current role and agreed developments through appraisal. Study leave for professional staff also includes instruction/teaching on courses for the benefit of other staff within the Trust.

Examples of study leave include: -

- Course/programme/seminar/workshop (in-house or external)
- Research
- Teaching
- Examining or taking examinations
- Attending professional conferences
- Training

The definition of professional and study leave from the Medical and Dental Staff Terms and Conditions of Service is contained in **Appendix 1**.

4.2 External Duties

External Duties are defined in the NHS Consultant Terms and Conditions as those undertaken as part of the Job Plan by agreement between the practitioner and employing organisation, but which do not include Direct Clinical Care, Supporting Programmed Activities or Additional NHS Responsibilities.

External duties might include trade union duties, undertaking inspections for the Care Quality Commission, acting as an external member of an Advisory Appointments Committee, undertaking assessments for the National Clinical Assessment Authority, reasonable quantities of work for the Royal Colleges in the interests of the wider NHS, reasonable quantities of work for a Government Department, or specified work for the General Medical Council.

This is not an exhaustive list.

4.3 Learning and Development Agreement

This is a contract between an employee and the Trust. It identifies the scale of financial recovery that will apply if the employee does not complete a funded training course / programme (not related to ill health), or leaves the employment of City Hospitals Sunderland or South Tyneside NHS Foundation Trusts, within 2 years of completing it. Staff requesting study leave will be required to sign and return the agreement, to the Training Department, indicating their acceptance of the terms within it, before any payment for the training course / programme is made.

4.4 Expenses

Expenses are defined as financial assistance associated with study or professional leave including subsistence (e.g. overnight accommodation) or travel. These must be approved by the Line Manager in advance and identified at the study leave application stage. Failure to do so may result in expenses not being paid. Expenses / financial assistance may include: -

- Salary

- Course fees
- Accommodation
- Travel Expenses

Where it is agreed by the manager that expenses will be paid, these will be as laid out in the NHS Terms and Conditions Handbook.

Claims for study leave related expenses, must be accompanied by valid, original receipts and submitted via the Trust's E-Expenses system within 2 months of being incurred; otherwise they will not be paid.

Career Grade Medical and Dental staff should also refer to **Appendix 1**.

All Trust employees are reminded that deliberate falsification or attempted falsification of travelling and subsistence expense claims may lead to disciplinary up to and including dismissal and/or criminal action (including prosecution) under the relevant legislation. In some cases prosecution, disciplinary and civil action to recover any monies may be pursued concurrently.

4.5 Mandatory Training

Mandatory training is defined as essential risk management training identified in the Trust's Mandatory Training Needs Analysis on the intranet.

4.6 Electronic Staff Record (ESR)

ESR is the NHS integrated HR and Payroll system. Requests for study leave must be made via ESR. Completion of study leave must be recorded as 'External Learning' via Employee Self Service on ESR and any qualifications gained as a result recorded in the Qualifications section of the employee's record.

4.7 Agenda for Change (AfC)

AfC is the NHS national grading and pay system introduced in 2004 to harmonise terms and conditions for non-medical/dental NHS workers and some very senior managers. The AfC Terms and Conditions Handbook defines subsistence allowances.

4.8 Objectives, Goals, Strategies, Measures (OGSMs)

The Directorate OGSM defines the skills and knowledge of staff required to deliver patient services. Managers will use the OGSM to identify any gaps in knowledge to inform an individual's Personal Development Plan.

4.9 Appraisal

Appraisal is the formal assessment of the performance of an employee over a period of time.

Where there is reference to appraisal in this policy, this applies to non-medical staff. Medical and Dental staff should refer to the Medical Appraisal Policy on the intranet.

4.10 Revalidation

Revalidation is the process by which, doctors and nurses are required to demonstrate on a regular basis that they are up to date and fit to practise. Revalidation aims to give extra confidence to patients that their doctor or nurse is being regularly checked by their employer and the relevant regulatory body.

4.11 TNA. Training Needs Analysis, referred to as 'TNA', is the process of identifying the gap between employee training and needs of training. Training needs analysis is the first stage in the training process and involves an annual process to determine whether training for staff is needed to address a skills / knowledge problem, which has been identified.

5. CRITERIA FOR STUDY LEAVE APPROVAL

Consideration should be given to the location of any training/study programme to minimise the need for any travel and / or subsistence costs being incurred. Managers should also consider whether skills and/or knowledge could be gained through means other than study leave and/or funded programmes. This will include educational programmes without educational credits.

Before employees take on national commitments, which will have a significant impact on the amount of official leave they may need to take, prior approval for non-medical staff must be sought from the Divisional General Manager. Medical and Dental staff must seek approval from the Clinical Director who may also take advice from the relevant Divisional General Manager.

Study leave (and additional professional leave for medical and dental staff) may be:

- With or without pay
- With or without course fees,
- With or without accommodation costs
- With or without travel
- With or without subsistence

The decision as to whether to grant study leave and/or pay associated expenses will be based on the following factors: -

- Is the employee being required to attend the training by their manager or the organisation?
- Is the training or development identified in training needs analysis and/or the individual's personal development plan?
- Is the training required by the individual in order to complete the professional revalidation process?
- Is the training relevant to the individual's current role?
- Is the training part of the employee's agreed development for a future role?

- Will the Trust benefit by the employee completing the training or is the benefit purely to the person undertaking the training?
- Is there an alternative means of providing the learning or a programme available more locally or at less cost?

Approving Managers

Study leave, which has any associated costs, must be approved by the managers below in line with the Trust's Standing Financial Instructions.

STAFF GROUP	AUTHORISER
Ward/Department staff	Directorate Manager
Ward/Department Managers	Directorate Manager
Matrons	Directorate Manager
Directorate Managers	Divisional General Manager
Divisional General Managers	Director of Operations
Executive Directors / Executive Committee Members	Chief Executive
Medical and Dental staff	Clinical Director
Clinical Directors / Deputy Medical Directors	Divisional General Manager

5.1 Mandatory Training

Staff must complete their mandatory training as and when necessary. A copy of the Trust's Mandatory Training Needs Analysis is available on the intranet. Managers must allow staff the necessary time away from the workplace to attend mandatory training as well as access to a computer to complete e-learning based mandatory training.

Study leave for other purposes will not be approved unless an employee's mandatory training is compliant at the time of application.

5.2 Development linked to current role/service development

This will be identified through the appraisal process and link back to current role or service developments and Directorate OGSMs. It should be submitted as part of the training needs process.

If centralised funding is approved this will cover course costs only and expenses must be negotiated with the manager. If funded solely by the directorate the level of funding must be agreed between the individual and the manager.

5.3 Career Development

If there is benefit to the Trust or Directorate from training which an individual wishes to undertake for career development purposes, managers may wish to grant study leave with or without part funding. For career development activities which are unrelated to role and of no clear benefit to the Trust, leave may be requested as annual or unpaid and there is no obligation on managers to grant such leave or provide any funding.

5.4 Continuing Workforce Development (CWD)

Health Education England North East Funding (Regional Contract)

Qualified non-medical professionals in Band 5 and above, have access to CWD modules via a contract between Health Education England North East (HEENE) and regional universities. This allows access to accredited modules without direct cost to the Trust.

Eligible staff members must agree the modules with their manager, taking into consideration service needs. These must be identified through the training needs analysis process (TNA). Application forms are available from Education and Training and must be signed by the manager and submitted to Education and Training for processing, and prioritising by the Training Manager against the number of places available to the Trust.

Managers must allocate leave to allow staff to attend any modules which have been agreed as a requirement to help meet service needs and Directorate OGSMs.

Managers are not obliged to guarantee study leave and patient care must not be compromised in allocating study leave. In the event that the staff member may not be released because of service pressures, the individual must notify the relevant university in advance. Failure to attend without advance notification incurs a financial penalty to the Trust which individuals or directorates may be liable for depending on the reason for non-attendance.

Employees who are being wholly or part-funded to undertake a training course / programme, will be required to sign a legally binding agreement, which will specify the amount they will be required to repay to the Trust if they do not complete the course / programme without good reason and / or the agreement of the Trust.

Funding for Continuing Workforce Development

The Trust has a Talent for Care budget, allocated by Health Education England, to fund key development and education for Trust staff at band 1 to 4 level.

The study must be required to meet the Directorate's objectives / service and workforce needs and have been identified through the appraisal process.

From April 2017, the Trust will pay an apprenticeship levy, to fund apprenticeships up to Masters level, which are programmes linked to an apprenticeship standard.

A plan of educational programmes against any budget, including the Apprenticeship Levy, will be produced by the Workforce Development and Education Manager on an annual basis. This will be drawn up from workforce plans for services in the Trust and information from Training Needs Analysis (TNA) returns will feed into this.

6. PART TIME WORKERS

Part time workers required to attend courses for essential training outside their normal hours/days of work, must be given the time off in lieu. (Refer Flexible Working Policy) For courses which are not essential the factors identified in Section 5.0 would be considered in agreeing time off for such training.

7. RECOVERY OF FINANCIAL ASSISTANCE

There is an expectation by the Trust that staff being provided with funding and/or study leave allocation for education, training or development activities will:-

- Attend and complete the programme/course/event, etc.
- Do any necessary work associated with a programme of study e.g. submit assignments
- Inform their manager of their progress
- Produce certificates to verify completion of a programme of study
- Seek support from their manager if they foresee any problem which may prevent them completing a programme of study funded by the Trust. This is a supportive mechanism so that appropriate information, advice and guidance will be provided to the individual before they “fail” a programme of study.
- The Trust reserves the right to recover funding from employees in circumstances identified below.
 - Failure to attend to complete a wholly or partly funded programme of study.
 - Failure to sit an exam or submit an assignment which leads to failure to complete a funded programme of study.
 - Staff leaving the employment of City Hospitals Sunderland NHS Foundation Trust or South Tyneside NHS Foundation Trust, within 2 years of completing a funded programme of study, which provides a qualification.

The Trust recognises that there may be valid reasons as to why an individual may fail to complete a course (e.g. sickness) and cases will be assessed on an individual basis. A decision will be taken in these cases by the Director of Human Resources as to whether to recover costs incurred by the Trust. Staff have the right to invoke the Trust’s Grievance Policy if they are unhappy with a decision to recover financial assistance.

8. PROCEDURE

8.1 Identifying training need and funding source (if necessary)

The manager and individual will identify the training requirement through appraisal and the training needs analysis process, linked to their current role, service needs and / or directorate objectives.

The individual and/or manager will identify a course that meets the individual's training needs, authorise any funding and expenses if these are to be paid.

Funding must be agreed by the person authorised to approve study leave expenditure as detailed above, before the individual takes the leave or attends the study / training event.

Where an employee undertakes external study leave and costs are incurred by the Trust, he/she must sign the Trust's Learning Contract. If the employee fails to do so the study leave must not be approved. All training may result in fees being recovered where the employee fails to complete the training or leaves the Trust's employment within a specified time period of completing it.

8.2 Applying for study leave

All requests for study leave, regardless of whether they are in the UK or overseas / abroad, must be made via ESR Employee Self-Service and managers must approve or reject them via Manager Self-Service. A 'How To' guide explaining the procedure / how to do this is available on the Trust Intranet.

8.3 Apply / share the learning

Managers should meet with the individual on their return from study leave to discuss what has been learned, what may be implemented as a result and what and how learning is to be shared with colleagues in the department/directorate or wider across the organisation.

8.4 Recording qualifications on ESR

If a qualification is achieved, the employee must record this on ESR. A How To guide explaining how to do this, is available on the Trust Intranet.

8.5 Expense claims

- Expenses must be claimed via the Trust's E-Expenses system, which can be accessed via the 'Expenses' link on the Trust Intranet.
- Where it is proposed to use Charitable Trust Funds to fund / part fund study leave expenses, the Trust Fund Manager should consult the Charitable Funds Accountant in advance of any study leave being approved to find out whether the proposed use of this funding is in line with Charitable Funds Committee criteria.

9. OTHER CONDITIONS

9.1 The following additional conditions apply to the granting of study leave;

- Where the employee is employed by more than one NHS organisation, the leave and the purpose for which it is required must be approved by all the organisations concerned;
- where leave with pay is granted, the employee must not undertake any remunerative work without the special permission of the Trust

9.2 Employees attending any meeting or course, which is sponsored by an external commercial body, or who are themselves sponsored to attend a non-commercial course must comply with the Trust's Counter Fraud, Corruption and Bribery Policy regarding conflicts of interest. An appropriate declaration must be made to the Director of Corporate Affairs who will ensure that the proposal meets with the relevant criteria before approving such attendance

9.3 The Trust may at its discretion grant professional or study leave outside the United Kingdom with or without pay and with or without expenses or with any proportion thereof. Application for such leave is via the normal process in this document but must be approved by the Divisional General Manager.

10. APPEALS

Staff may use the Trust's Grievance Policy and Procedure, if they have any concerns about decisions taken in relation to this policy.

11. MONITORING COMPLIANCE / EFFECTIVENESS OF THE POLICY

The Trust will monitor the effectiveness of the policy by the following methods:-

Area for Monitoring	Method	Frequency	Responsibility	Monitoring/Assurance Group	Lead for Development of Action Plan	Monitored By
Monitoring Training activity	Delivery against TNA and training plans	Annual	Training Manager	Education and Training Group	Education & Workforce Development Manager	Education and Training Group
Recovery of financial assistance	Universities reports on DNAs. Reconciliation of leavers against study leave	Quarterly	Training Manager	Education and Training Group	Director of HR	Education and Training Group

12. CONSULTATION, APPROVAL, REVIEW AND RATIFICATION

Consultation

Medical Director/Clinical Directors/Consultants
 Medical Education Department
 HR Strategy Group

Joint Consultative Group
Local Counter Fraud Specialist

Approval

Executive Committee

Ratification

Policy Committee

Review

3 yearly

13. DISSEMINATION, TRAINING AND IMPLEMENTATION

Dissemination

- Team Brief
- Intranet

14. EXTERNAL REFERENCES

- Consultant Terms and Conditions - <http://www.nhsemployers.org/your-workforce/pay-and-reward/nhs-terms-and-conditions>
- SAS Doctors Terms and Conditions - <http://www.nhsemployers.org/your-workforce/pay-and-reward/nhs-terms-and-conditions>
- NHS Terms and Conditions Handbook - <http://www.nhsemployers.org/your-workforce/pay-and-reward/nhs-terms-and-conditions>

15. ASSOCIATED TRUST DOCUMENTS

- Staff Appraisal and Development Policy
- Grievance Policy and Procedure
- Flexible Working Policy
- Induction and Mandatory Training Policy
- Travel and Associated Expenses Reimbursement Policy
- Medical Job Planning Policy
- Counter Fraud, Bribery and Corruption Policy.
- Training Needs Analysis
- Medical Appraisal Policy

RECOVERY OF FINANCIAL ASSISTANCE

SCALE OF RE-CHARGES

In the event that an employee does not complete Trust / NHS funded training / course including failure to submit assignments, which results in failure to complete the training, the Trust will seek to recover 100% of the cost. That said, each situation will be reviewed on its individual merits and personal circumstances applying at the time, taking into account any mitigating information.

Where an employee leaves the Trust within 2 years of completing funded training / course, the Trust will seek to recover a proportion of the funding. The following scale of charges will apply:-

Employee leaving the Trust within	% of Financial Recovery
6 months	100%
7 – 11 months	75%
12 – 17 months	50%
18 – 23 months	25%
More than 24 months	None

Any employee who is discovered not to have attended a training event / course / seminar etc. for which they have been granted study leave and they have not notified their manager in advance, will be dealt with in accordance with the Trust Disciplinary Procedure, which may include formal disciplinary action up to and including dismissal.

The matter will also be referred to the Local Counter Fraud Specialist in accordance with the Trust Counter Fraud, Corruption and Bribery Policy.

MEDICAL AND DENTAL STAFF**PROFESSIONAL / STUDY LEAVE DEFINITIONS AND ENTITLEMENT**

NHS terms and conditions of service for Medical and Dental staff make no distinction between professional leave and study leave, using the terms interchangeably even although the terms are discrete.

Professional and Study Leave

Means professional leave or study leave in relation to professional work including, but not restricted to, participation in:

- study (usually but not exclusively or necessarily on a course or programme)
- research
- teaching
- examining or taking examinations
- visiting clinics
- attending professional conferences
- training.

Applying for Professional or Study Leave

Approval of requests for leave are subject to the need of the service.

Where leave with pay is granted, the doctor must not undertake any other paid work during the leave period without the Trust's prior permission.

Period of Leave

Subject to the needs of the service and the conditions set out in this policy and in national terms and conditions, professional or study leave will normally be granted to the maximum extent consistent with maintaining essential services in accordance with the recommended standards.

The recommended standard is leave with pay and expenses or time off in lieu with expenses up to a maximum of 30 days (pro-rata for part time staff) including off-duty days falling within the period of leave, in any period of 3 years for professional purposes within the United Kingdom.

Additional Periods of Professional and Study Leave in the United Kingdom

The Trust may at its discretion and subject to the needs of the service, approve additional professional or study leave in the United Kingdom, with or without pay and with or without expenses or with some proportion thereof.

Professional and Study Leave outside the United Kingdom

Within the 30 days' (pro-rata allowance for part time staff), the Trust may at its discretion and subject to the needs of the service, approve professional or study leave outside the United Kingdom with or without pay and with or without expenses or with any proportion thereof.

Conditions

The following conditions apply:

- Where a doctor is employed by more than one NHS organisation, the leave and the purpose for which it is required must be approved by all the organisations concerned;
- Where leave with pay is approved, the doctor must not undertake any remunerative work without the special permission of the relevant Clinical Director or (in the case of Clinical Directors) the Divisional General Manager;
- Where an application is made for a period of leave with pay that exceeds 3 weeks, the Trust may require that one half of the excess over 3 weeks is counted against the individuals' annual leave entitlement, the carry forward or anticipation of annual leave within a maximum of 3 weeks being permitted for this purpose.

External Duties

External Duties are defined by NHS Terms and Conditions as those undertaken as part of the Job Plan by agreement between the practitioner and employing organisation, but which do not include Direct Clinical Care, Supporting Programmed Activities or Additional NHS Responsibilities.

External duties might include trade union duties, undertaking inspections for the Care Quality Commission, acting as an external member of an Advisory Appointments Committee, undertaking assessments for the National Clinical Assessment Authority, reasonable quantities of work for the Royal Colleges in the interests of the wider NHS, reasonable quantities of work for a Government Department, or specified work for the General Medical Council.

This list of activities is not exhaustive.

Applying for Professional / Study Leave

Applications for study leave (excluding leave which is a regular commitment included within an employee's job plan) must be submitted and approved in ESR, at least 6 weeks' in advance of the date of the intended training / study / course. The HR Department has produced an ESR Self Service Guide explaining how to do this, which is available on the Trust Intranet.

External Duties

Leave for external duties, does not count towards study leave entitlement. Applications for such leave must be submitted and approved in ESR at least 6 weeks' in advance of the

date of the event / activity / duty (duties which are included within an employee's agreed job plan do not need to be applied for using the ESR system, having been agreed via the job planning process)

Expenses

Course Fees up to a total of £3,000 may be claimed in any 3-year period, (pro-rata for part time staff). Under normal circumstances, no more than £1,000 may be claimed in any one year, (pro-rata for part time staff).

Clinical Directors and Divisional General Managers are responsible for ensuring that any funding approved for course fees is managed within budget.

In the case of the following services, the doctor will not be paid an additional fee, or - if paid a fee, then he/she must pay the fee to the Trust:-

- Lectures and teaching during the course of clinical duties;
- Lectures and teaching that are not part of clinical duties, but are undertaken during Programmed Activities

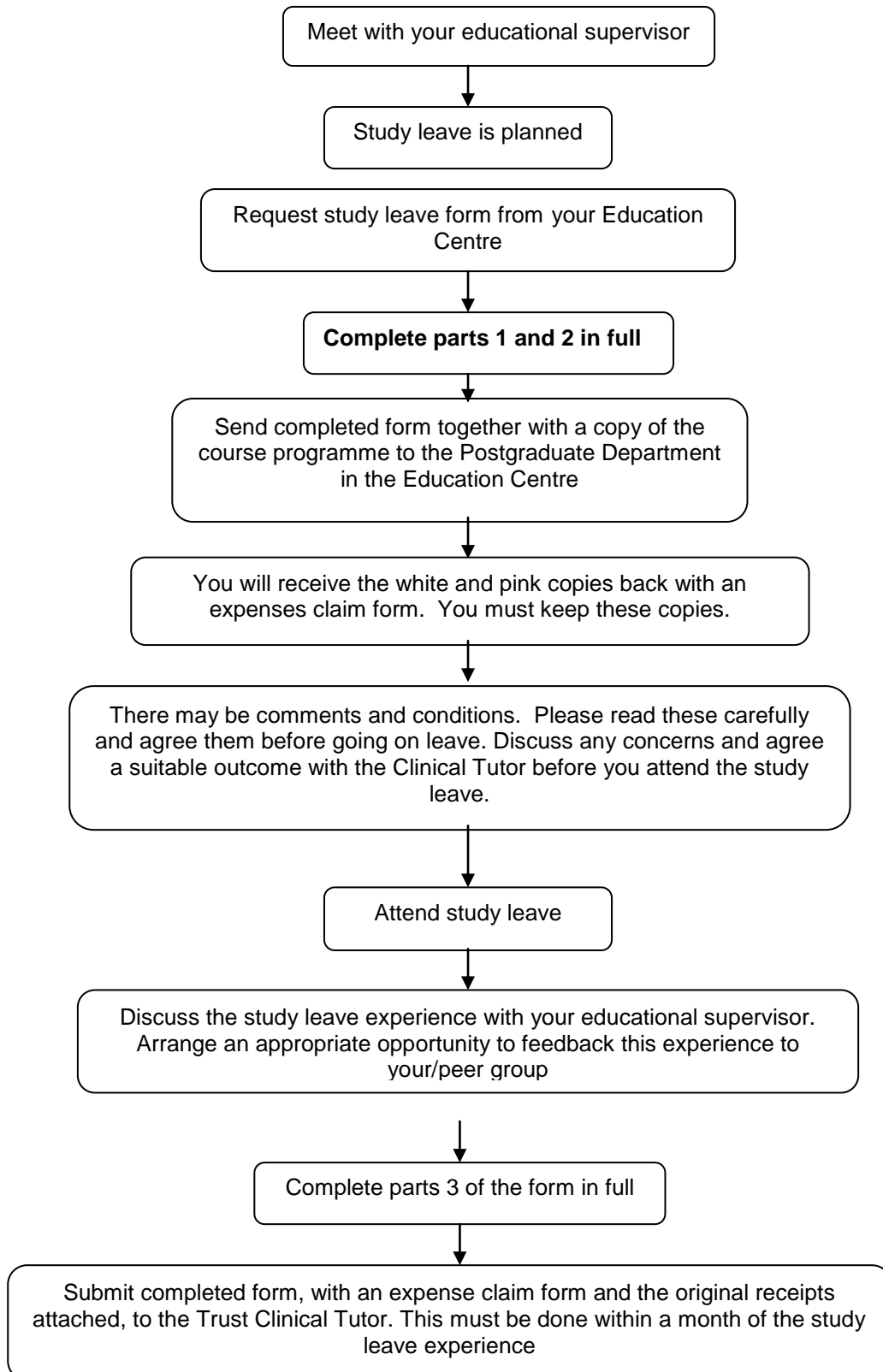
Services for which the doctor can retain any fee that is paid:

- Lectures and teaching that are not part of clinical duties and are undertaken in the doctor's own time or during annual or unpaid leave.

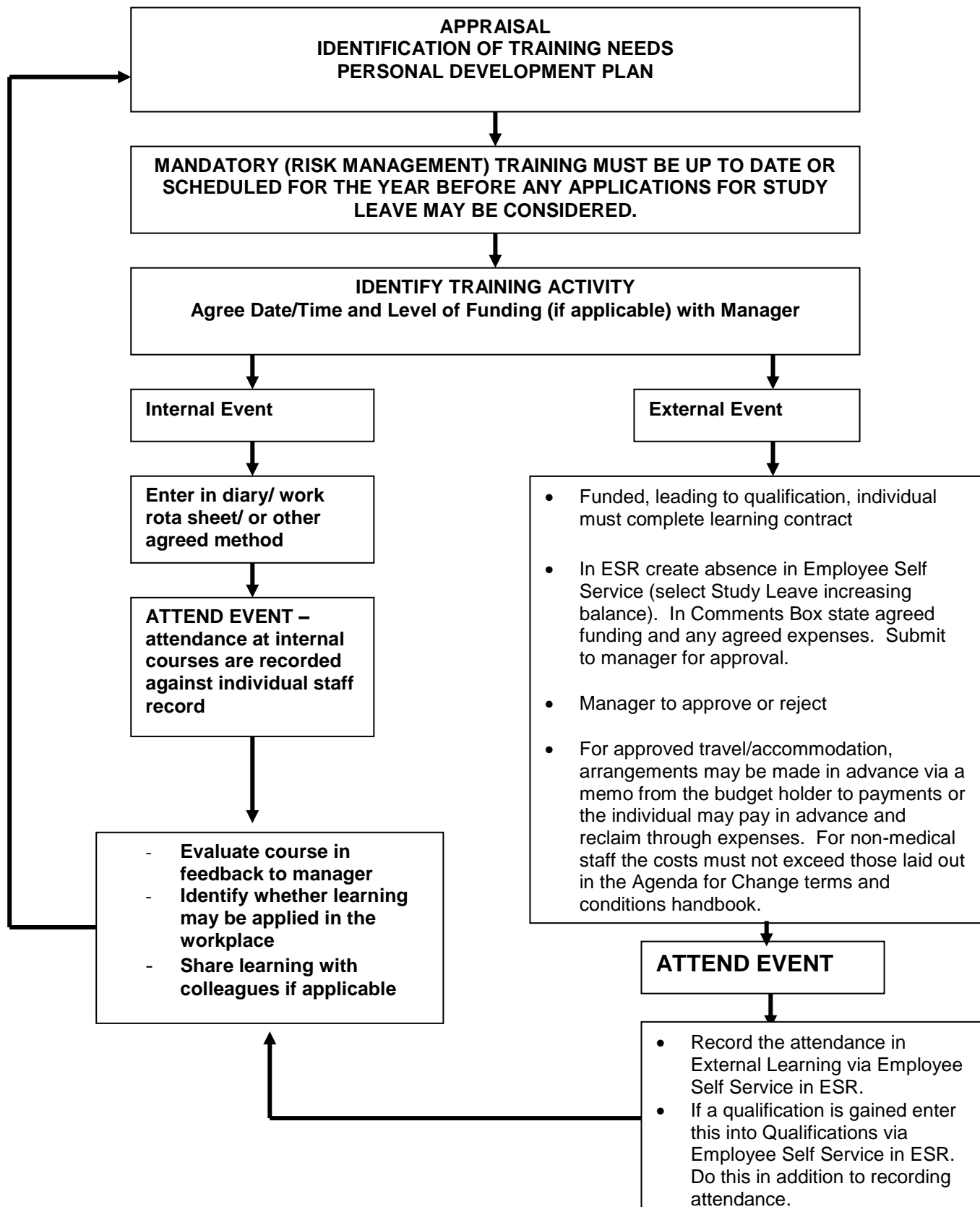
Where leave with pay is granted, the doctor must not undertake any other paid work during the leave period without the Trust's prior permission.

STUDY LEAVE APPLICATION PROCESS FOR JUNIOR DOCTORS

Note:- The Northern Deanery provides further information for Medicine & Dentistry on their website



STUDY LEAVE APPLICATION PROCEDURE



PLAIN ENGLISH GUIDE TO POLICY

What is the policy for?

This policy explains:-

- What study leave is
- How you apply for it

What does the policy say?

Everyone who works for us must:-

- Meet with their manager when they start working for us and every year after that (appraisal)
- Agree what training they need to do for their job. Have a list of the training they need to do (Personal Development Plan)
- Apply for study leave in the ESR system if the training is not on the Trust's site
- Attend the training or let their manager know why they can't attend
- Be aware that if the course is paid for by the Trust but they do not attend without good reason the Trust may ask for its money back

Managers' must: -

- Have a meeting with each of their staff within a month of starting and every year after that (appraisal).
- Identify what training is needed and agree a Personal Development Plan.
- Make sure staff are up to date with mandatory training before agreeing study leave for anything else.
- If staff drop out of a course or leave the Trust within two years of completing the programme, contact Education and Training so that the money paid for the course may be reclaimed.