

# Guide to Applying for Study Leave and Claiming Study Leave Related Expenses

## PLEASE NOTE:

This is not the full guidelines, but a brief run through of study leave for trainees working in Greater Manchester, Cumbria & Lancashire and Cheshire & Mersey to help with applying for study leave. The full guidelines are available on the Study Leave Section of the HEE North West Office website.

This guide applies to StRs (core & higher), FTSTAs, SpRs

This guide does not apply to GP, Dental or Foundation trainees

## How to find the Study Leave Section of the website:

The Study Leave Section of the website can be found at: [www.nwpgmd.nhs.uk/studyleave](http://www.nwpgmd.nhs.uk/studyleave)  
The website contains the full guidelines, the application form, details of the application process and names of study leave administrators.

## CONTACTS

### How to get in touch with the Study Leave Section:

Study Leave Administrators  
Health Education England North West Office  
3rd Floor, Three Piccadilly Place  
Manchester  
M1 3BN

Email: [nwd.studyleave@nw.hee.nhs.uk](mailto:nwd.studyleave@nw.hee.nhs.uk)  
Tel: 0161 625 7680 / 7681  
Fax: 0161 625 7510

# The application process is to approve time off as well as expenses.

If you do not need to take time off as study leave but wish to claim expenses you must still apply for study leave.

## There are two parts to the study leave process:

### 1. The Application

This is the part of the process that involves getting approval for the time off and for any funding associated with the leave. You cannot claim any expenses unless you have had them approved first.

### 2. The Claim

The process involved in reimbursing expenses associated with the study leave. You can only do this after your application has been fully approved.

## GENERAL INFORMATION

Study leave budget years run from 1<sup>st</sup> March to 28<sup>th</sup>/29<sup>th</sup> February each year. The year in which funding will be taken is based on the year in which the 1<sup>st</sup> day of the study leave falls, not on the year which it was applied for.

The year from which the number of days allowed is calculated runs from 1<sup>st</sup> October to 30<sup>th</sup> September each year.

### Core Trainees

Study leave is normally permitted up to a maximum of 30 days per year (15 days per half year).

### Specialist Registrars and Higher Specialty Registrars (ST3 and above)

Study leave is permitted for a maximum of 30 days per annum.

### FTTAs/LATs

Study leave is permitted for a maximum of 30 days per annum or pro rata when the appointment is for less than a year (for example a maximum of 15 days study leave can be taken by a LAT appointed for 6 months).

In some circumstances, 15 of the 30 days will be taken for the formal teaching programmes organised by the individual specialities. Please check with your Training Programme Director. Trainees may be granted up to a maximum of 7 days leave per year for private study.

Trainees who are absent from work on sick leave are not usually eligible for study leave unless there are exceptional circumstances. Those trainees who are on maternity or paternity leave should have access to study leave only in exceptional circumstances. Please see the full guidelines for further details.

## THE APPLICATION

### Guidance for applying for study leave

Please make sure you have the most recent version of the study leave application form, as it is occasionally updated. This can be downloaded from the Study Leave Section of our website: [www.nwpgmd.nhs.uk/studyleave](http://www.nwpgmd.nhs.uk/studyleave)

Applications should be submitted to the Study Leave Section at HEE North West Office at least one month prior to the proposed leave. Retrospective applications will not be considered. Your local base hospital may require notification of time off further in advance; please check your local trusts requirements.

Applications should be submitted to the correct Study Leave Administrator for your speciality along with confirmation of approval from your Educational Supervisor and Rota Coordinator (they do not necessarily have to sign the form, an email from them confirming their approval will suffice).

Core Medicine Trainees (CMT), Core Surgical Trainees (CST), ACCS trainees and Anaesthetic trainees at Grade ST1 & ST2 have Study Leave Administrators based on their sector, details of which are on the Study Leave Section of our website.

*Lists of Study Leave Administrators can be found on the Study Leave Section of our website: [www.nwpgmd.nhs.uk/studyleave](http://www.nwpgmd.nhs.uk/studyleave)*

**Psychiatry trainees** should use the online School of Psychiatry form (linked from the Study Leave page on our website) which will automatically forward your application to the Study Leave Administrator for Psychiatry based in the School of Psychiatry. Applications should not normally be sent to the Study Leave Administrators based in the HEE North West Office.

Applications should not normally be sent directly to your Training Programme Director (TPD). An exception would be where your TPD is also your Educational Supervisor.

When calculating study leave, all the days approved and carrying a liability for expenses are counted, including weekends and Bank Holidays. Time spent travelling to and from the event is also counted.

If you are presenting at a conference you are applying for, either a poster or orally, please provide confirmation of this when you apply.

### Overseas Applications

Overseas study leave can be approved for higher specialist trainees in exceptional circumstances. Overseas is defined as any country outside the UK.

Study leave abroad will not be granted for the purpose of studying for an overseas qualification or to attend examinations overseas.

Generally only 1 overseas trip will be funded in the whole of your training (not per year).

### **Changes to your approved study leave**

You must notify us of any changes to approved study leave. This includes cancellations, date changes and changes to fees. Failure to do so may cause delays in the processing of your claim, or you may not be reimbursed the expenses you were expecting.

## **THE CLAIM**

### **Important things to remember about claiming expenses**

- Claim forms must be submitted within 3 months of the start date of the course, or before the end of the February following the start of the course, whichever comes first (i.e. by the end of the budget year from which the funding will come from).
- All claims must be supported by receipts. Certificates of attendance are not acceptable as proof of payment, unless they specifically state that you have paid and how much you have paid.
- Please quote your reference number in the top right hand corner of the claim form. Your reference number is the six digit number which can be found on the top right corner of the approved application form and in the subject line of the approval email.
- Please make sure you sign and date the second page of the claim form.
- Claims cannot be processed until after the first day of the study leave.

### **Claim Forms should be submitted to:**

Study Leave Administrator  
Health Education England North West Office  
3rd Floor, Three Piccadilly Place  
Manchester  
M1 3BN

## **EXPENSES**

### **What expenses will be reimbursed**

- A nominal sum of funding per trainee is allocated each budget year. As a guide for the current budget year the nominal per capita allocation is £805 for a full-time trainee. The allocation for part-time trainees and trainees employed for only part of a budget year is calculated on a pro-rata basis. Some specialities may have their allocation top-sliced. Please check with your Training Programme Director about whether this happens in your speciality.
- Additional rules may apply for your speciality (particularly for Core Medical Training). Please check with your Training Programme Director.

- Travel expenses will be paid at 23p per mile, up to a maximum of a standard class return rail fare from your base hospital to the course/conference venue (unless overseas).
- Accommodation is paid to a maximum of £55 per night (Bed & Breakfast), and subsistence is paid to a maximum of £20 per day.
- Exams fees will not be reimbursed.