

NHS England Education - North East (NHSE NE)

Study Leave Policy

This local documentation aligns with the nationally agreed approach to NHSE Study Leave.

This documentation applies to doctors and dentists in training within the North East and North Cumbria locality only.

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Executive Summary

Study leave and funds are available to doctors and dentists in training to support them in achieving curricula outcomes. This document provides an overarching policy and set of standard operating procedures to ensure a fair and transparent approach is taken to manage study leave applications for all doctors and dentists in training in the North East and North Cumbria.

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1. Introduction

NHS England is committed to developing quality training programmes as laid down by Colleges / Faculties / General Medical Council / General Dental Council and local training committees / Schools. Study leave is available to support doctors and dentists in training with their professional development. It should be used for specific educational and training needs that cannot be obtained through the training programme. Funding for study leave ensures that doctors and dentists in training continue to be paid for the time spent absent from their place of work. With prior agreement, reasonable expenses incurred by the doctor or dentist in training for approved study leave will be reimbursed. Study leave must be used for the purpose for which it is granted and includes, but is not restricted to participation in:

- Study (linked to a course or programme)
- Research
- Teaching
- Taking examinations
- Attending conferences for educational benefit
- Rostered training events
- e-learning packages
- Online courses, conferences, and events

2. Scope

This policy aims to provide in detail the overarching approach to study leave for NHSE NE doctors and dentists in training within Foundation, Specialty, Dentistry and Primary Care Schools. It is important to note that there are differences between these directorates in the way study leave is managed, therefore the principles of this policy need to be read in conjunction with the relevant directorate procedures, detailed in section 5.

3. Duties

3.0. NHSE NE responsibilities

NHSE NE has an obligation to ensure that all doctors and dentists in training comply with the requirements of:

- National overarching Study Leave Guide
- Conditions of Service for NHS Doctors and Dentists in Training (England)
- COPMED Study Leave Guidelines
- Current Reference Guide for Postgraduate Foundation and Specialty Training in the UK - The Gold Guide
- Current Reference Guide for Postgraduate Dental Specialty Training in the UK – The Dental Gold Guide

Sessional Clinicians fulfilling roles on behalf of NHSE NE (e.g. Heads of School, Training Programme Directors, Foundation Tutors, etc) have a responsibility as part of their remit to ensure that this policy is implemented for the doctors and dentists in training.

3.1. Doctors and Dentists in training responsibilities

- 3.1.1** Doctors and dentists in training have a responsibility to be aware of what is mandatory in terms of progressing to the next level of training and being awarded their CCT, CCST or CESRCP.
- 3.1.2** The support required by each individual doctor or dentist in training to achieve their curriculum outcomes or to meet their educational needs should be discussed and agreed with their educational supervisor in the first instance.
- 3.1.3** It must be clear how the educational activity will support the doctor or dentist in training to achieve their curriculum outcomes and how the activity will help them to improve the care they are able to provide to patients.
- 3.1.4** For educational activities or courses to be supported, the content should be mapped to curriculum outcomes. The activity should offer value for money and should be positively evaluated by the doctor or dentist in training and the faculty.
- 3.1.5** Attendance at courses or conferences should either be taken online or as close to the doctor and dentists in training's base as possible.
- 3.1.6** Requests to meet the costs of study leave will be reviewed by NHSE NE prior to receiving approval ensuring courses represent best value. Funding requests will not usually be approved if there is a similar course available for free or a cheaper course available, which would meet the training curriculum requirements. Doctors and dentists in training should not assume that a course will be supported and should therefore not make payments for courses prior to receiving approval.
- 3.1.7** If funding is being sought, the doctor or dentist in training should ensure they apply in a timely fashion and at least 8 weeks in advance of the date of the study leave to ensure that a decision can be made prior to costs being incurred.
- 3.1.8** Trainees should consider the environmental impact of the chosen location for study leave and the mode of transport. Public transport is more environmentally sustainable than driving which is generally more sustainable than flying.

3.2. Local Education Providers (LEP) responsibilities

- 3.2.1.** Requests for Study Leave should be viewed positively, but with a view to ensuring that the needs of service delivery can be safely met.
- 3.2.2.** To ensure that LEP statutory and mandatory training is not taken as part of study leave allowance. This is an LEP/employer responsibility and will not be funded from the study leave budget.
- 3.2.3.** LEPs will cover costs of all mandatory training required to fulfil the doctor or dentist in training's clinical role (e.g. life support courses which are not a requirement of the individual's curriculum).
- 3.2.4.** To ensure that attendance at interviews and selection processes is not taken as study leave.
- 3.2.5.** LEPs are to make allowances for elected doctors or dentists in training representative to take part in NHSE NE meetings, School Board meetings, Specialty Training Committees and National Training Committees. Study leave should not be required for such activities.
- 3.2.6.** To ensure every effort is made not to rely solely on doctors or dentists in training for service delivery, whereby a number are required to attend the same event e.g., College examinations.
- 3.2.7.** The supervising clinician responsible for approving a study leave request should try to determine if a course represents reasonable value for money. However, as the approval of funding sits with NHSE NE, colleagues at LEP level should not advise definitively that the costs of a course or event will be provided.

4. Principles and Procedures underpinning Study Leave and funding arrangements

4.0 Principles of applying for study leave

Study budget reforms were introduced across England (effective from April 2018) to deliver equity of access to educational resources based on individual need and to facilitate improved quality, efficiency, flexibility and transparency supporting:

- Study leave enabling trainees to achieve their curriculum outcomes
- Consideration of discretionary study leave that is career enhancing activity or that adds value to the individual and/or supports the wider system

Reforms to study budgets brought a departure from the previously established approach of a notional individual annual allocation of funding. There is no 'cap' imposed to any individual; each study leave episode applied for is considered for approval on its own merit, following the principles outlined in this document applied to the individual circumstances of the trainee.

However, it is important to emphasise that the overall study leave budget is finite and local offices have a responsibility to manage the expenditure and financial balance. This may mean that some activities not required to achieve curriculum outcomes (termed 'discretionary study leave'), may not be approved and/or part-funding may be required by the trainee reflecting both NHSE's and the individual's commitment to their enrichment. Additionally, where there is a cheaper alternative to achieve curriculum requirements, a study leave request is unlikely to be fully funded.

Typically, study leave applications submitted within NHSE NE where expected course fees exceed £500 will be reviewed by additional approvers (beyond Educational Supervisor and Local Education Provider) before a final decision to approve or decline is confirmed to the trainee. This would usually be at Training Programme Director (TPD), Head of School and/or Deputy Director level (or their equivalents) depending on the programme.

Doctors and dentists in training continue to apply for Study Leave through local mechanisms. Placement providers retain the decision as to whether a doctor or dentist in training may be released (i.e., time) for study leave and it remains a requirement for a doctor or dentist in training to initially get their study leave request approved by their educational supervisor/equivalent at the first stage of this process.

This local NHSE NE Study Leave policy outlines the local processes to be followed in implementing the national approach.

Allocation of Study Leave Time:

Study leave time, up to the limits described below, will be granted flexibly and tailored to individual needs in accordance with the requirements of the curriculum.

Grade	Days per annum
Foundation Dentists and Dental General Professional Training Trainees (practice element)	0*
Dental General Professional Training Trainees (hospital rotation only)	5
Foundation Doctors in training Year 1	15**
All other Doctors and Dentists in training	30

**Study leave entitlement for Foundation Dentists and Dental General Professional Training Trainees in the practice element is included in the formal Study Day programme.*

*** 13 days provided through delivery of professional learning programme and ALS Course.*

- 4.0.1** Requests for study leave time in excess of these limits may be considered in exceptional circumstances.
- 4.0.2** Less than full time (LTFT) doctors and dentists in training will receive their study time allocation pro rata to those of a full-time colleague. Where a doctor or dentist working LTFT is required to undertake a specific training course as required by the curriculum, which exceeds their pro rata entitlement to study leave, arrangements would normally be made for additional study leave to be available. Such cases are managed on an individual basis between the Directorate/School and LEP.
- 4.0.3** Where a doctor or dentist in training takes statutory leave (e.g., parental leave), their entitlement to study leave continues, and this may be taken during 'keeping in touch' days or will otherwise accrue to be taken at a later date. However, it would not usually be permitted to 'carry over' study leave into the next training year. Study leave requests would be made to the LEP the doctor or dentist in training was allocated to prior to the commencement of statutory leave.
- 4.0.4** Prior to any request being submitted, the Educational Supervisor plays a critical role as they determine, through discussion with the individuals they supervise, the appropriateness of the Study Leave request. It is an individualised approach, linked to the curriculum requirements and the Personal Development Plan of the individual trainee. It should be clear how educational activity will

support the trainee to achieve their curriculum outcomes and how the activity will help the trainee to improve the care they are able to provide to patients.

4.1 How to apply for study leave

- 4.1.1** The online platform for Study Leave applications, Accent Leave Manager (ALM) was launched for all doctors and dentists in training within NHSE NE from 10 January 2023. This replaces the previous Study Leave form 'manual' approach. A dedicated 'live document' [NHSE NE Accent Leave Manager FAQs](#) is maintained on the website to inform and support trainees and other users of ALM. This document should be referred to in regard to detailed information about the ALM system which is not replicated in this overarching local Study Leave policy.
- 4.1.2** Study Leave requests must be planned well in advance to ensure the rota will not be adversely affected, allowing time for a plan to be agreed to accommodate the proposed leave. Before submitting their application on ALM therefore, the doctor or dentist in training must agree the proposed Study Leave with their Clinical Supervisor (CS) and select the self-declaration to confirm the CS and Rota Coordinator (or Practice Manager for GP trainees in Practice) has been informed.
- 4.1.3** Usually, it is expected that Study Leave applications are submitted at least 8 weeks prior to the first day of leave. An LEP may use its own discretion to consider requests from individuals that are submitted either retrospectively or within the 8 week notice period, as the responsibility to approve time off a rota is held at LEP level. Doctors and dentists in training should wait for their application to be fully approved before making payments or attending the study leave event. If an applicant chooses to pay for a course prior to full approval being granted they risk incurring costs which may not be refunded.
- 4.1.4** As part of ALM roll-out, where appropriate, Schools/Directorates have prepared a list of 'common courses' for doctors and dentists in training within their programmes which are courses/events typically considered to be suitable and/or likely to be applied for as relevant to the curriculum requirements/stage of training.
- 4.1.5** Such courses have been added to ALM so that doctors and dentists in training may select the appropriate course/event from a drop-down menu when applying for Study Leave. Applications from the 'common courses' list will typically be approved. The list is not exhaustive and has been created to help guide trainees/faculty as to activity likely to be appropriate. The intention of the list is not seeking to inhibit what doctors or dentists in training can consider and apply for but summarises 'common courses' likely to be suitable.
- 4.1.6** As with any Study Leave, individuals should discuss this with their Educational Supervisor and/or programme team (e.g., Training Programme Director) before applying to ensure that the intended Study Leave is

appropriate. For example, it may be suitable for a doctor or dentist at certain levels of training to undertake any of the listed 'common courses' however it may not be feasible or appropriate to undertake all courses on a given list. This will vary by specialty/level of training and individual circumstances.

Note, there are currently no 'common courses' identified within NHSE NE for the Foundation Programme.

- 4.1.7** If the period of Study Leave falls when a doctor or dentist in training will have rotated to a different LEP, prospective approval from that LEP is required. This will automatically be facilitated to the correct LEP via ALM as long as the trainee's future placement is on the Trainee Information System (TIS) database which is typically completed no later than 12 weeks before rotation change dates.
- 4.1.8** Where funding is to be reimbursed, this can be claimed by the individual using 'EASY expenses', the system in place for all Lead Employer Trust employees. Please note, although in the longer term it is hoped ALM can be aligned with EASY, for the time being these remain two distinct systems: ALM is used for the trainee to apply for and have their Study Leave considered and either approved or rejected. EASY is then used to apply for and have costs incurred re-imbursed. On EASY, trainees are required to upload their fully approved Study Leave application (via ALM PDF download) so that EASY approval can be smoothly processed.
- 4.1.9** Doctors and dentists in training are encouraged to update their portfolios with evidence of carrying out their study leave, and feedback on its value.
- 4.1.10** Whereby a submitted Study Leave application is to be subsequently cancelled (e.g., due to the course being cancelled), the doctor or dentist in training can cancel this via ALM. In addition to cancelling on ALM, the trainee must inform their LEP Clinical Supervisor and/or Rota Coordinator (depending on the circumstances) if planned Study Leave time is now not to be taken. Where costs have been incurred (e.g., course fee) and an individual subsequently is unable to attend, the fee may still be reimbursed, however, this will depend on the individual circumstances.
- 4.1.11** Where study leave needs to be taken by a doctor or dentist in training on their non-workday or a weekend, this must be agreed by the responsible educational / clinical supervisor and LEP. The trainee is still required to submit such study leave on ALM for approval which will also ensure any related expenses to be claimed can be submitted via the usual processes. Any time to then be taken as time off in lieu must have prior agreement with the LEP to approve suitable time off the rota.

4.2 Discretionary study leave

4.2.1 Discretionary study leave can be granted for educational or professional development opportunities that enhances the knowledge, skills and attitudes of the doctor or dentist in training or enhances any aspect of patient care but is not mapped to any direct curriculum requirements.

4.2.2 Proposed discretionary study leave which has a high cost is unlikely to be fully funded. For such activities, part-funding towards the course/conference fees and expenses cost may be considered reflecting both NHSE's and the trainee's commitment to their enrichment. Therefore, the trainee would have to fund the remaining costs if they still wished to undertake the activity.

4.2.3 If an external body such as a Medical Royal College suggests a doctor in training attends an international conference where not already required by their curriculum, in such circumstances, NHSE NE expects that body to contribute at least 50% of the costs.

4.2.4 Reasonable adjustments and consideration of individual circumstances must be given for discretionary study leave applications (including international) from trainees with protected characteristics.

4.2.5 Discretionary leave must be judged on its own merit for the circumstances of the individual. However, typically, the following aspects would be considered when assessing the suitability of an application:

- Individual is achieving curriculum competences at/above the expected rate in their programme.
- The activity is truly in line with career trajectory and not a repeat of a similar activity (different learning objectives).
- Previous discretionary applications have been considered to promote fair use of study leave funding.
- The activity provides a skill/competence that is in demand at service level across the NHS or in the individual's intended place of work.
- The approver(s) must assess the educational benefit and value for money of the course. This requires consideration of the relative cost in comparison to other activities and the perceived benefit to the future NHS. The approver(s) must be assured that regional or more cost-effective alternatives have been explored.

4.3 Applying for International Study Leave

International study leave is not an entitlement and, in general, should usually only be contemplated by exception. International study leave should occur when the learning outcomes from the course/conference are not available in the UK (joint societies with a UK and Ireland remit for these purposes are considered as UK).

4.3.1 One international conference/meeting, providing all other curriculum requirements are met will be considered for each doctor or dentist in training for any one programme, defined as Foundation*, Core, Higher or otherwise every three years to ensure there is no disadvantage to 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 (or their representative).

** F2 training year only. ISL is not permitted during F1.*

4.3.2 An overseas conference/meeting where the individual will attend remotely (not in person) will usually not be considered as international study leave. However, the suitability of the specific conference/meeting and remote attendance fee should be discussed between the trainee and their ES/equivalent. The TPD/equivalent should also be consulted to confirm the impact factor and quality of the specific international leave proposed.

4.3.3 A report covering the entirety of the leave may be requested from the doctor or dentist in training following attendance.

4.3.4 For approved international study leave applications, NHSE NE 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. When the course/conference fee is waived by the course provider, NHS NE will consider funding the full cost of economy travel and accommodation.

4.3.5 If an international study leave request is approved via ALM it is the responsibility of the trainee to review any comments added to the ALM request by TPD and/or the School Director as to which expense(s) will be funded. Approval **does not** mean that all expenses have been approved (as per 4.3.4).

4.3.6 For accommodation, in alignment with the agreed maximum rate for study budget claims within the UK, the overnight rate should not exceed £150 per night. Subsistence expenses will not usually be re-imbursed by NHSE NE.

4.3.7 Doctors and dentists in training who wish to make a request for international study leave must apply via ALM, selecting 'international' from the list of leave types.

4.3.8 All estimated expenses (course/conference fee, travel expenses, accommodation expenses) must be included on the ALM international study

leave request. This will facilitate approvers in making an informed decision. Any international requests that do not include all estimated expenses may potentially be rejected.

4.3.9 All international applications irrespective of proposed cost will require consideration and additional approval beyond ES and LEP (e.g., TPD/Head of School (or equivalent) and/or Deputy Dean depending on the trainee's specific programme). ALM will automatically manage any international application through the correct approval chain.

4.3.10 Any International Study Leave application must be submitted on ALM, attaching the completed NHSE NE International Study Leave supporting information form (**Appendix 4**). Within this, it must be clearly demonstrated that one or more of the following criteria has been met:

- Study leave is for where a course or activity is part of the college curriculum or guidelines on required training where it has not been possible to acquire competences within the UK.
- Study leave is for where a course is set out as a mandatory requirement of college training to reach the required qualification to practice where it has not been possible to acquire within the UK.
- Study leave aligns to specified areas of trainee's Personal Development Plan (previously discussed and agreed with the ES), detailing why this cannot be acquired within the UK
- Study leave is for the presentation of significant research findings from within an NIHR recognised academic clinical fellowship or clinical lectureship.
- Study leave is for the presentation of research undertaken as part of a clinical training programme.

4.3.11 If the ISL proforma has not been attached, the application will be rejected and trainee advised to resubmit with the attachment. If the above criteria have not been demonstrated the international study leave application will usually be declined. As with any study leave application declined, trainees have the right to appeal as outlined in the 'appeals' section of this policy.

4.3.12 If a doctor in training wishes to fund a period of international study leave by other means, the ES/approvers should still ensure the activity aligns to the curriculum or Personal Development Plan. This must be the case for any period of international Study Leave irrespective of how it is funded and an international application via ALM must be made even if for 'time only'. In this instance the trainee should include a comment on their ALM request to specify they are applying for 'time only'.

4.4 Re-imbursement for expenses incurred during Study Leave

- 4.4.1** Doctors and dentists in training are required to pay their expenses and will then be reimbursed as per the national Study Leave and/or Whitley Council rates (see **Appendix 2**) provided the original receipts are submitted on the EASY system within six weeks of the event. If a doctor or dentist in training pays above the maximum rates allowable, they will usually be required to meet any excess costs themselves.
- 4.4.2** Doctors and dentists in training are to choose transport that represents the best value for money, checking that their proposed transport option is the cheapest at that time (e.g., comparing domestic flights/train/driving where appropriate). Doctors and dentists in training should book advance train tickets, where possible to minimise costs. First class fares will not usually be reimbursed unless it can be demonstrated that this purchase was cheaper than standard fares.
- 4.4.3** Doctors and dentists in training are required to pay the cost of any social events themselves.
- 4.4.4** Study leave funding should not be used for 'joining'/membership costs for a conference or course, even if this is advertised to provide a reduced attendance fee.

4.5 How to claim expenses

- 4.5.1** The doctor or dentist in training must retain all expense / itemised receipts (e.g., hotel bills, credit card slips etc.).
- 4.5.2 For Lead Employer Trust (LET) employees (i.e. typically all doctors and dentists in training within NHSE NE):** All expense claims are processed via the online 'EASY expenses' system.
- 4.5.3** All doctors and dentists in training will need to ensure they upload their fully approved study leave form (via PDF download from ALM) when making any claims along with receipts.

4.6 Early Re-imbursement of Study Leave Expenses

- 4.6.1** If required, doctors and dentists in training who are LET employees can arrange for their course fee and/or expenses to be paid prior to their attendance, so long as the early re-imbursement application would be four or more weeks prior to the study leave dates.
- 4.6.2** If a doctor or dentist in training has applied for and been paid early reimbursement and subsequently is not able to attend the study leave event they must inform the LET Payroll Team at let.expenses@nhct.nhs.uk to organise recovery of the advanced fee from their salary.

4.7 Postgraduate Examinations and Private Study

- 4.7.1** Doctors and dentists in training are required to pay exam fees, i.e., this cannot be claimed from study leave budgets. NHSE NE will, however, reimburse the expenses for attempts at UK professional examinations. NHSE NE will contribute towards travel and accommodation costs to sit all parts of the examinations but will not pay for individuals to attend to receive their qualification. This does not include exams taken outside the UK (e.g., the American VQE). Trainees wishing to sit a non-UK clinical training examination may be given Study Leave time, but expenses would not be reimbursed.
- 4.7.2** Exam Preparation Courses may be provided locally as part of the general training programme. Such courses should be accessed ahead of private courses as they offer broad support and value for money. Where locally delivered courses are not available, one private preparation course per exam would usually be funded. Additional attempts at the exam will be considered in exceptional circumstances.
- 4.7.3** Postgraduate examinations pose distinct challenges and often require a change in approach from undergraduate study. The deanery's Exam Game Plan online resources (link - [Exam Game Plan Resources](#)) and group coaching workshop (link - [Health Education North East Online Booking System](#)) provide guidance on how to revise effectively alongside work and life commitments, and how to tackle common issues like procrastination and exam-related anxiety. A second group coaching workshop, Stress Management for Exams, is also available. This is designed for those who have already attended the Exam Game Plan workshop and provides additional support specifically around managing stress.

Some doctors and dentists in training may wish to use private study leave for the purpose of home-based revision. This should only be taken after the Exam Game Plan resources have been accessed. Doctors and dentists in training may usually take up to 12 days per year and up to 6 days per exam sitting for private study. Please note that home-based revision is often not the most effective way to prepare for clinical exams.

Private study will be considered for writing up academic qualifications (e.g. PhD, Masters).

Doctors in training are not entitled to any expenses for private study leave.

4.8 Postgraduate Degree Qualifications

- 4.8.1** Postgraduate degree qualifications are no longer in curricula so would only be considered in exceptional circumstances where there is an established link to the curriculum and a commitment that the qualification will be integral to the doctor and dentist's future career. Study Leave time could be considered. It is unlikely that NHSE NE would cover the course fee or any related expenses.
- 4.8.2** NHSE NE's Learner Support and Faculty Development offer a range of courses on leadership and management and on medical education. These courses are of high quality and cover a wide range of opportunities and can be accessed via:
<https://madeinheene.hee.nhs.uk/education2/Doctors-in-Training/Leadership>
Should a doctor in training undertake similar courses outside of these programmes, it is unlikely that NHSE NE would cover the course fee or any related expenses

4.9 Out of Programme (OOP)

- 4.9.1** Historically, it has been the case that trainees on OOP are not normally eligible to apply for study leave. It may be appropriate for trainees to access Supported Return To Training ('[SuppoRTT](#)') funding/opportunities in preparation for returning from OOP.
- 4.9.2** Currently, the NHSE position remains that individuals on OOP are not eligible for study leave time and funding, except for OOPT (Out of Programme Training). In exceptional circumstances and at the discretion of the Postgraduate Dean, study leave funding during other OOP types may be considered for curriculum-based activity.
- 4.9.3** Applications for individuals on OOPT will only be approved and funded where there is clear evidence linking the application to the specific curriculum requirement. Where uncertain, this will be at the discretion of the 'base' Postgraduate Dean.
- 4.9.4** The trainee's base local office will be responsible for approving requests and any resulting funding. The individual's employer is responsible for re-imbursing costs who may or may not be associated with the base or the host local office. Liaison between relevant local offices should therefore take place to ensure smooth administration.
- 4.9.5** Where an individual chooses to take study leave while OOP, that individual would then not be eligible to apply for, and have funded, that same element again upon re-joining their training programme.
- 4.9.6** Currently the ALM system does not facilitate study leave requests from DiT who are on OOPT. In this instance the DiT should contact the ALM Team at england.accentleavemanagerqueries.ne@nhs.net and a paper form will be provided.

4.10 Period of Grace

4.10.1 Doctors working on a Period of Grace are not eligible for funding from the NHSE NE study budget as these funds are to be used for meeting Certificate of Completion of Training (CCT) requirements. However, doctors can receive study leave time for ensuring revalidation requirements are met.

Dentists in post CCST two-year training posts are the exception to this rule.

4.11 Interview preparation courses

4.11.1 Interview practice (including for consultant interviews) is usually provided locally within training programmes as part of career guidance, funded from study leave budgets. Where appropriate in-house courses are available, funding for private interview courses will not be approved, although there is Dean's discretion for exceptional circumstances.

5 Variations specific to individual Directorates, Specialty Schools or Programmes

It is important to note that there are some differences in procedures for managing study leave for doctors and dentists in training, therefore this policy should be read in conjunction with the relevant section below:

5.0 Study Leave Procedure for Dentists in training

Foundation Dentists attend a mandatory NHSE NE study programme, therefore are not entitled to any additional study leave.

Dentists training within the General Professional Training programme attend a mandatory NHSE NE study programme which counts towards study day entitlement. An additional five discretionary study days are available, use of which must be approved in advance by the Associate Dean for Dental Foundation Training.

In general, Dental Core and Dental Specialty dentists in training should be meeting core curriculum requirements before considering discretionary enhancement activity.

Dental Core and Dental Specialty dentists in training who are progressing satisfactorily may wish to develop a particular interest and undertake a limited amount of training to that effect, but they should ensure that this does not hinder their progress or detract from the study of their core Curriculum. At all times (with the sole exception of taking

an exam or when so advised by a TPD), the Regional Teaching Programme provided by NHSE NE's Directorate of Multi-Disciplinary Dental Education should take precedence. A range of approved study leave opportunities has been identified. Requests for any enhanced activity that is not included must be approved by the Associate Postgraduate Dental Dean for Specialty Training or for Dental Core Training as appropriate (Appendix 1).

If a dentist in training disagrees with a decision about their study leave made by their educational supervisor (or TPD for Dental Public Health dentists in training), they should in the first instance contact the relevant authoriser (for Dental Public Health their Associate Postgraduate Dental Dean for Specialty Training) and request an explanation/review.

If the dentist in training remains of the opinion that the wrong decision has been made, they can appeal against the LEP decision by writing to the Postgraduate Dental Dean or their nominated deputy. Appeals should be made in writing using the appeal form (see appendices). Appeals should be submitted within four weeks of the original decision to refuse study leave; failure to do so will mean the appeal will not be processed.

Appeals will be considered by the study leave committee and will be made up of the Business Manager or nominee, a Dentist in Training representative, an additional representative from the Dental Specialty or Dental Core Training and Postgraduate Dental Dean or their nominee. The decision of the study leave committee is final.

5.1 Study Leave Procedure for doctors in training in the Northern Foundation School (NFS)

Study leave during foundation training is provided to support the acquisition of the three Higher Level Outcomes (HLOs) set out in the UK Foundation Programme Curriculum 2021. Each of the HLOs is divided into between three and five Foundation Professional Capabilities (FPCs).

Evidence that the outcomes have been achieved and the FPCs demonstrated is provided using a portfolio of evidence supported by summative evidence from established healthcare professionals who provide reports on clinical and professional behaviours demonstrated by the foundation doctor in the workplace.

Study leave is utilised to facilitate delivery of your mandatory, curriculum-based, protected clinical and generic professionalism teaching over the two-year programme. All Foundation doctors are expected to demonstrate achievement of a minimum of 60 hours clinical and generic teaching in each training year. This must include a minimum of 30 hours core teaching and 30 hours non-core teaching which is trainee-led continuing professional development. There are no courses or exams mandated for successful completion of the Foundation Programme. The Prescribing Safety Assessment is however required for Full Registration and a licence to practice with the GMC.

F1 doctors in training have an allowance of 15 days which are provided as

follows:

Educational Activity During F1	Core Teaching/ Professional Learning Programme	Non-core Teaching	Advanced Life Support Course	Taster Days
Total Duration (Days)	13 days		2 days	5 days
Total Duration (Hours)	Minimum 30 hours	Minimum 30 hours	Variable	Variable
Curriculum Delivery	Yes Mandatory clinical and professionalism teaching	Yes Doctor in training-led learning	Yes ALS is an F2 competency but is offered during F1 training	Optional
Protected Time	Yes	Yes	Yes	Subject to approval
Study Leave Application Required	No Teaching dates arranged by LEP	N/A	No ALS Course dates arranged by LEP	Yes Via Accent Leave Manager
Geographical Location (UK)	With own Local Education Provider	With own Local Education Provider	With own Local Education Provider	LEP within region only
Geographical Location (International)	N/A	N/A	N/A	Not Permitted During F1

Discretionary Study Leave during F1 (ALL) – Quality Improvement

F1 doctors will be supported with time and funding to present a Quality Improvement project where this has been undertaken during (F1) training. This will be one opportunity to present at a local, regional or national event. Please note that the Foundation School is unable to support F1 doctors to present projects

- which were completed during Medical School.
- at different events on multiple occasions.
- at events outside of the UK.

International Study Leave – Not Permitted During F1

F1 doctors in training are not eligible to apply for International Study Leave and should not attempt to apply or book an event, course, travel or accommodation in anticipation of a request being considered for approval as this will be declined.

Applications for ISL will only be accepted from F2 doctors in training.

Reference to the Foundation Programme in Section 4.3 of the local Study Leave guidance relates to F2 only.

Taster Opportunities

We strongly support the use of study leave for 'Taster' opportunities and recognise the logistical benefits of enabling doctors in training to undertake Tasters during F1 prior to applying to specialty training in October/November (i.e. in their first F2 post).

F1 doctors therefore have an optional allowance of 5 days (from the 10 days available across the two-year Foundation Programme) for 'Taster' opportunities within the North East and North Cumbria locality. Alternatively, doctors in training may choose to take all 10 days during F2 training.

Tasters outside of the region will be approved in exceptional circumstances only and doctors in training will be asked to demonstrate why it is not possible to arrange the requested Taster experience with one of 10 Trusts operating in our locality (8 acute Trusts and 2 Mental Health Trusts). It is important to check and confirm approval before submitting an application on Accent Leave Manager.

A Taster should be taken in a specialty which you do not have as a placement within your 2-year programme.

Tasters outside of the UK will not be permitted under any circumstances.

Tasters in General Practice

F1 doctors are unfortunately not permitted to undertake Tasters in GP but may apply in advance for a Taster during their first F2 post. There is currently a separate application process for a GP Taster – please contact gillian.quinn6@nhs.net for further information.

The exploration of wider potential career options and reflection is encouraged before the narrowing of options and more detailed consideration takes place. To fully benefit from 'Taster' opportunities individuals should discuss their career aspirations with their Educational Supervisor.

Discretionary Study Leave during F1 (SFP)

F1 doctors on the Specialised Foundation Programme will be supported with time and funding to present their research project at a local, regional or national academic

conference however. Please note that this is one opportunity to present at a local, regional or national event and that the related research must have been undertaken during foundation training. Any request for study leave to present research which was undertaken during Medical School will be declined.

F1 doctors on the Specialised Foundation Programme are also able to apply for study leave to attend any event (within the UK - events outside of the UK are excluded) which is explicitly linked to the objectives agreed with their Academic Supervisor as part of their Personal Development Plan provided that this has been approved in advance by Professor Gill Vance, FP Director for SFP and Nicola Whitelock Business Manager for the Foundation School. An example of an event which would be supported is the 2-day regional course 'An Introduction to Research in the NHS'. This must also be approved on Accent Leave Manager by your nominated Educational Supervisor.

Research during Specialised Foundation Programme (F1)

Please note that research activity outside of the UK is not permitted at F1 level. This would be counted as Time out of Training (TOOT) which may result in an extension to formal training.

Postgraduate Qualifications

The Foundation School is unable to approve financial support for the purposes of undertaking a postgraduate qualification such as a Postgraduate Certificate in Medical Education unless this opportunity is offered as part of a formal Foundation Priority Programme.

Self-Development Time (SDT)

SDT is intended to be used for non-clinical activities that are essential for meeting the curriculum requirements for successful sign-off at ARCP or for developing future career plans – examples include meeting with supervisors, working on your ePortfolio, carrying out Quality Improvement work, formally reflecting on your clinical practice, and exploring career opportunities. SDT is not study leave rather it is time built into your work schedule. Within NFS F1 doctors should be allocated the equivalent of 2 hours per week and F2 doctors should be allocated the equivalent of 3 hours per week. This time can be taken weekly, or more likely, as a block (i.e. one day full every month).

Prescribing Safety Assessment (PSA)

F1 doctors in training will have three opportunities to sit the Prescribing Safety Assessment and are not required to apply for study leave for this. The dates for all sittings will be circulated by the NFS in advance and shared with your local Foundation Tutor/Admin Support team who will liaise with the relevant Rota Co-ordinators to ensure trainees are released from clinical duties.

F2 and SAF2 doctors in training have an allowance of 30 days which are provided as follows:

Educational Activity	Core Teaching	Non-core teaching	Discretionary Study Leave
Total Duration (Days)	5 days study leave <i>based on 6 hours teaching per day</i>	5 days study leave <i>trainee-led learning</i>	10 days study leave
Total Duration (Hours)	30 hours minimum must be achieved	30 hours minimum must be achieved	variable
Curriculum Delivery	Yes – mandatory, time protected clinical and generic professionalism teaching.	Yes	No but should be explicitly linked to learning outcomes
Protected Time	Yes	Yes	
Study Leave Application Required	No <i>Teaching dates are arranged by LEP</i>	Not applicable	Yes

F2 doctors may apply to use any remaining unallocated days for the purpose of discretionary study leave provided that the request is consistent with maintaining safe clinical services. Applications should be submitted 8 weeks in advance of the leave requested to minimise any disruption to services.

Study leave requested by individual F2 doctors must be supported by their Educational Supervisor and should be used to support the aims of the Foundation Programme; achieve specific learning outcomes; or explore career opportunities and improve wider professional development.

With effect from August 2023 study leave requests with a course or conference fee of over £500 will require approval by the Foundation School. This will automatically be managed by the online ALM system.

Foundation doctors in training on a less than full-time basis are entitled to pro-rata access to study leave.

Study leave should not be used to prepare for specialty examinations during Foundation training but may be used to take a specialty examination (i.e., NFS will allow F2 doctors to take study leave on the day of a professional College examination). F2 doctors in training are however permitted to utilise some of their 'Taster' allowance to prepare for specialty examinations.

Up to 10 days (excluding any days taken during F1 for Taster opportunities) can be used to support learning about different clinical specialties during F2. This is linked to the career exploration component of the Foundation Curriculum and enables

individuals to develop a better understanding of how the various specialties contribute to patient care.

F1 and F2 doctors are able to claim travel/mileage expenses for Taster experiences. Study leave expenses should be claimed via the EASY Expenses system as explained in this Policy.

F2 doctors are eligible to apply for International Study Leave in line with the NHSE local Study Leave Policy. Please ensure that you familiarise yourself with the ISL Supporting Information Form (Appendix 4) within which it must be clearly demonstrated that one or more of the criteria relevant to the Foundation Programme have been met: a) Study leave aligns to specified areas of trainee's Personal Development Plan (previously discussed and agreed with the Educational Supervisor) detailing why this cannot be acquired within the UK and b) Study leave is for the presentation of research undertaken as part of a clinical training programme.

Research during Specialised Foundation Programme (F2)

There is an option to undertake a maximum period of 4 weeks research activity in Tanzania under the supervision of Professor Richard Walker during your academic block in F2 however there are strict criteria which must be met for this to be approved. Applications will only be considered for **time** to participate in established research overseen by and options for funding must be explored directly with The Bright Charity.

ALS Course during Stand-alone F2 Training

Stand-alone F2 doctors who have not successfully completed an ALS course prior to starting in post will also be supported to attend a course and your local Foundation team will co-ordinate a place for you. The number of days available for discretionary leave will then be adjusted accordingly.

5.2 Study Leave Procedure for doctors in training in Primary Care (GP)

GP Trainees are referred to the national principles for study leave and local processes. In all areas, the following principles should apply:

- GP doctors in 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.
- In general GP doctors in training should be meeting core curriculum requirements before considering discretionary enhancement activity. Discretionary activity is defined in the general study leave documents.
- 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. 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.

- 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).
- Trainees should apply in the way described in this local policy Via ALM.

Please note that when working in GP posts, full time trainees should, in the average week, work 7 sessions in a clinical setting plus:

1 session Regional Teaching (most weeks)

1 session Protected in-house Teaching.

These are mandatory for you to attend and your Training Programme / Trainer to provide.

1 session self-directed study time.

This final session is usually used each week by trainees to work on their e-P work etc. However, it could be accumulated (by working in your GP practice instead of having self-directed study time that week) and used to attend other courses and conferences. Such arrangements will need to be discussed with your Trainer before you commit to using it in this way. As long as you are progressing satisfactorily, consent would not usually be withheld. You will still need to apply for study leave time according to your practice's arrangements for doing this.

The School of Primary Care has published an Automatic Approved course list.

Please find the link to the approved study leave courses here:

https://madeinheene.hee.nhs.uk/general_practice/Trainees/Study-Leave

Private Study Leave: The school does not encourage the taking of private study leave for any reason. This includes exam preparation, as the best preparation for both AKT and CSA is consulting and reflecting on casework. However, if you do decide that some would be beneficial, we remain in line with the study leave policy for private study as stated above.

5.2.1 Study Leave Procedure for doctors and dentists in training in Specialty Training.

The processes outlined in this policy applies to all doctors in training within the eleven Specialty Schools and Specialty Trainees in Dentistry and includes all doctors and dentists in training employed by the Lead Employer Trust (LET). However, as study leave funding arrangements for Public Health and Dental Public Health fall outside of usual specialty tariff funding arrangements there is a different process for approval and budgetary control in that school and for Dental Public Health Specialty trainees.

Specialty Specific arrangements: Some specialty programmes have arrangements in place whereby identified specific training courses are paid for directly by NHSE NE. This removes the need for doctors in training to arrange the payment of fees on an individual basis. As these costs are paid as a lump sum it is essential that doctors in training apply for the required study leave time to gain approval and ensure they attend these courses. Attendance on a course does not affect a doctor in training's ability to claim further funding for study leave.

6. Appeals

If a doctor or dentist in training disagrees with a decision, they should in the first instance contact the relevant authoriser that refused the study leave application and request an explanation / review.

If a doctor or dentist in training remains of the opinion that the wrong decision has been made, they can appeal against the decision using the national appeal form (see **Appendix 3**). The appeal form must clearly state the reason(s) for the appeal, including any new evidence that may support the appeal process.

Once completed the appeal form should be sent via email to:

england.accentleavemanagerqueries.ne@nhs.net

Anonymity for appellants will be maintained wherever possible unless the individual confirms their consent to waiving this on the form.

Appeals should be submitted within four weeks of the date that the original decision to refuse study leave was communicated to the trainee. Failure to do so will mean the appeal will not be processed. Appeals will then be considered by a panel convened within the local office that will include a senior member of the PGMDE team, a trainee representative and the Postgraduate Dean or nominee, or, for dentists in training, to the Postgraduate Dental Dean.

Appeal panels will consider the information submitted on the form and the appellant is not required to attend. The appellant can however request to attend the panel (with or without support, e.g., trade union representative) but must make that clear at the point of submitting their appeal form.

The doctor or dentist in training will receive a response to their appeal via email within 20 working days of submission with the result of the appeal outlining the reasons for the decision reached.

NHSE NE reserve the right to refer appeals back to the Trust or Employing Authority where it is deemed within their remit to resolve. NHSE NE reserve the right not to enter further appeals thereafter where the supervising clinician/Trust/Employing Authority have applied the guidance for study leave in the correct way.

7. Equality Impact Assessment (EIA)

As a public body NHSE NE has given due regard to the need to avoid discrimination and promote equality of opportunity for all protected groups when making policy decisions.

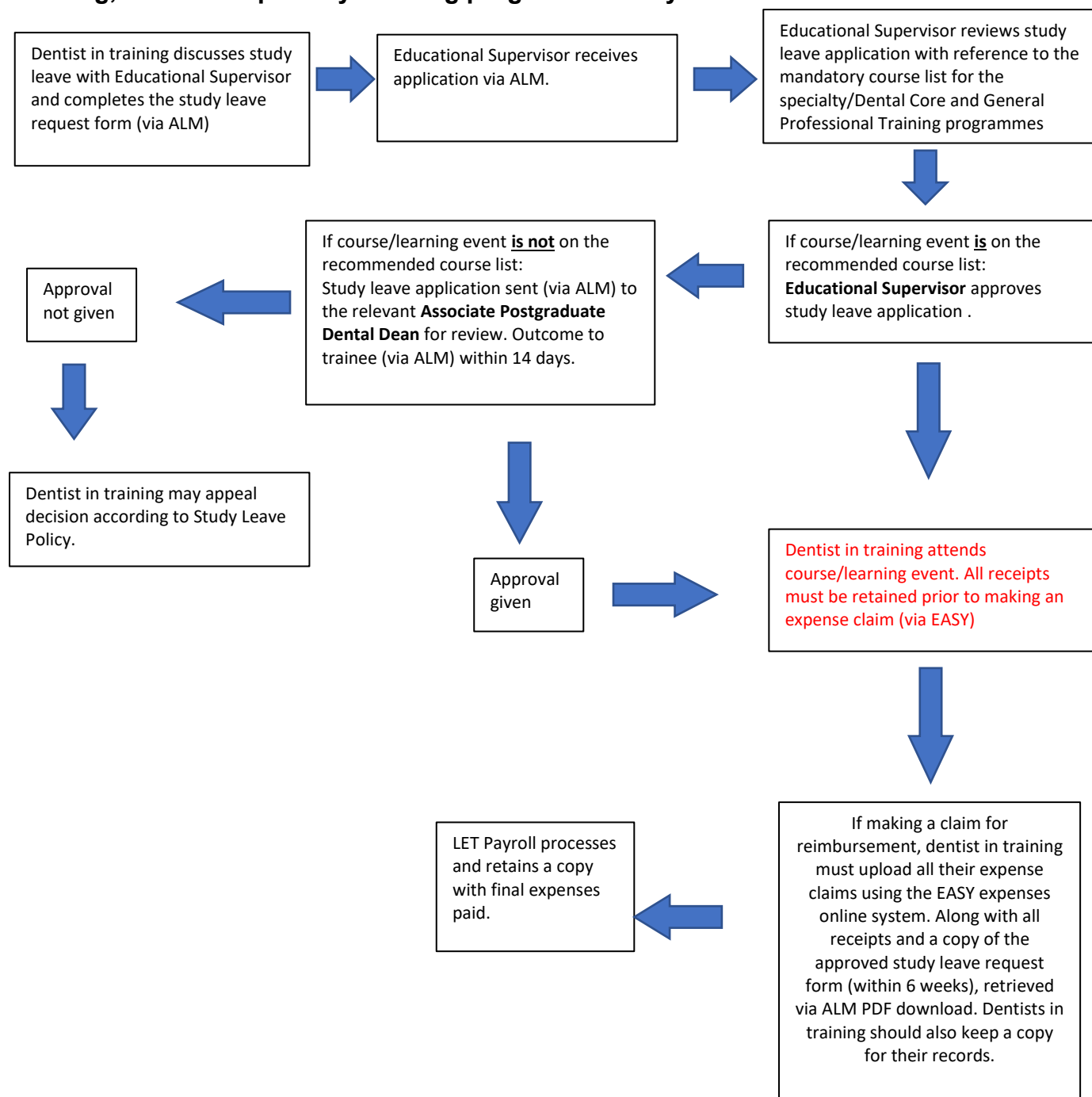
8. Monitoring Compliance and Effectiveness

Compliance with this policy will be assured by internal auditing and reporting of expenditure. Results will be submitted to the Dean's Management Team following financial year end. Should discrepancies be identified, faculty/LEPs/Schools/directorates (as appropriate) will be notified, and any required policy changes considered to ensure that appropriate corrective actions are taken.

Appropriate and timely updates will be provided of any policy changes being implemented to ensure that governance processes are robust.

9. Associated Documentation

Appendix 1 – Study Leave Process for Dentists in General Professional Training, Core and Specialty Training programmes only.



Appendix 2 - TRAVEL AND SUBSISTENCE ALLOWANCES

Listed below are the maximum amounts doctors and dentists in training can be reimbursed. This aligns to NHS Terms & Conditions of service ([NHS Terms and Conditions of Service Handbook | NHS Employers](#))

Please note: *Expenses cannot be paid unless original receipts are provided. Alcohol is not re-imbursed under any circumstances.*

Overnight Allowances

This is to cover all expenses whereby overnight accommodation is required for one night or more.

Accommodation: The below rates are for single occupancy only, in the event of shared occupancy with other doctors or dentists in training the cost should be divided equally and each trainee should submit their own expense claim for reimbursement. Please note, when sharing accommodation with colleagues the below rate still applies per night, (e.g. if 4 trainees are sharing accommodation outside London, they are entitled to expenses of £30 per night each):

- **Up to £120 per night for overnight accommodation**
- **outside of London, and up to £150 within London and overseas**

In the event of shared occupancy with family or friends please note 50% only of the costs will be refunded.

Night Allowance in Non-Commercial Accommodation (friend or relative's accommodation): **£25.00**. This includes a meal allowance. The address must be provided.

Meals:

Where overnight accommodation required: £20.00 max per 24hr period

NB: It is usually acceptable for a claim to be made for food shopping which is then used as meals consumed across multiple days of the approved study leave duration. However, the total claimed cannot exceed up to a £20 maximum per day (e.g. for 3-day duration, a maximum of £60 could be claimed). Meals claimed when eating out cannot exceed the £20 maximum in any 24hr period.

Day rates: Allowance can be claimed where an individual is away from home but does not stay overnight:

- **Lunch (more than 5 hours away including the period between 12-2pm): £5.00**
- **Evening Meal (more than 10 hours away after 7pm.): £15.00**

Expenses to attend Gala/Conference Dinners will not be reimbursed from the study leave budget.

TRAVEL

As stated within the policy: Doctors and dentists in training are to choose transport that represents the best value for money, checking that their proposed transport option is the cheapest at that time.

Car

- Individuals may claim for travel in their own car by the most direct route at the rate of **24p/mile**.
- Only the shortest mileage between base hospital and destination can be reimbursed.
- Tunnel and bridge tolls will also be reimbursed if receipts are provided.
- Car rental would not usually be approved unless the individual can demonstrate that, at the time of booking, it was the cheapest option (i.e. compared to rail/plane)
- Parking charges at your destination will normally be reimbursed.

Rail

You may claim for the cheapest standard class rail fare.

Pedal cyclists

Individuals who use pedal cycles to make journeys relating to approved study leave activity will usually be reimbursed for eligible miles travelled at the rates of reimbursement published by NHS Employers (currently 20 pence per mile).

Taxis

Travel by taxi should be in exceptional circumstances only (which must be stated when submitting) examples of which include:

- as an agreed reasonable adjustment, for example a disability
- carrying large/heavy luggage or equipment
- where personal safety might be identified as a risk, for example, public transport is unavailable or where it feels unsafe to travel late at night by public transport
- no other reliable or regular forms of public transport are available to and from the location
- where this option is more cost effective than public transport, for example, several people are travelling and the cost of a taxi is likely to be cheaper than the cumulative cost of public transport (NB: in the event of travelling with other trainees, the cost must be divided and each individual seek reimbursement)

Appendix 3 - Study Leave Appeal Form

Please submit completed form via email to:
england.accentleavemanagerqueries.ne@nhs.net

Trainee Details			
Name:		Contact No.	
GMC Number:		Email Address:	
Current Trust:			
School:		Specialty:	
Level:		Submission Date:	
Course applied for (i.e. focus of this appeal)			
Date of course applied for			
Signature: (Note, electronic signatures are permitted)			
Anonymity for the appellant will be maintained within the Local Office wherever possible. If you are happy to consent to waiving anonymity, please mark X in the box			

Reason for Appeal

In the space below, please state the reason(s) for your appeal including any evidence that you feel will support this. Why do you think this decision should be reconsidered? (additional evidence can be submitted with this form to support your appeal)

Appendix 4 – ISL Pro-forma

INTERNATIONAL STUDY LEAVE (ISL) PRO-FORMA

**FOR COMPLETION BY ALL DOCTORS AND DENTISTS IN TRAINING WITHIN
NHS ENGLAND EDUCATION - NORTH EAST & NORTH CUMBRIA (NHSE NE)
WHEN APPLYING FOR AN EPISODE OF INTERNATIONAL STUDY LEAVE**

For each episode of ISL, this form must be completed and uploaded as an attachment to the Accent Leave Manager application before submitting for approval.

This pro-forma has been created to enable doctors and dentists in training wishing to apply for ISL to provide additional supporting information to accompany their Accent Leave Manager application. Approvers can refer to the contents of the form to assist in their decision to support or decline the application.

Please note that F1 doctors are not eligible to apply for International Study Leave.

As stated in the NHSE NE local Study Leave policy (as aligned to national Study Leave principles), International Study Leave (ISL) is not an entitlement and, in general, should usually only be contemplated by exception. ISL should occur when the learning outcomes from the course/conference are not available in the UK.

For approved ISL applications, as per current national policy, NHSE NE 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. (See local Study Leave policy for full ISL details).

NHSE NE doctors and dentists in training who wish to make a request for ISL must apply via Accent Leave Manager, selecting 'international' from the list of leave types. All international applications irrespective of proposed cost will require consideration and additional approval beyond Educational Supervisor and Local Education Provider. This will be approval at Training Programme Director/Head of School (or equivalent) and/or Deputy Dean level depending on the individual's specific programme. Accent Leave Manager will automatically manage any international application through the correct approval chain.

An overseas conference/meeting where the individual will attend remotely (not in person) will usually **not** be considered as ISL and therefore in these instances 'international' should not be selected on Accent Leave Manager and this pro-forma is not a required attachment. However, the suitability of the specific conference/meeting and remote attendance fee should always be discussed between the trainee and their ES/equivalent and onward approval would be managed as per all other non-ISL applications.

INTERNATIONAL STUDY LEAVE FORM Page 1 of 3	
TRAINEE NAME:	
SPECIALTY:	
CURRENT GRADE:	
FULL TITLE OF COURSE/EVENT APPLYING FOR VIA ISL:	
COUNTRY OF EVENT:	
WEBLINK TO FULL PROGRAMME/DETAILS OF PROPOSED ISL EVENT: <i>Please provide weblink or otherwise upload information as an additional attachment when submitting on Accent Leave Manager:</i>	
DATE(S) FOR THIS PROPOSED ISL EPISODE:	
TOTAL NUMBER OF STUDY LEAVE DAYS REQUESTED:	
DETAIL ANY ISL PREVIOUSLY APPROVED/TAKEN WITHIN PREVIOUS 3 YEARS:	
INTERNATIONAL STUDY LEAVE FORM	

Page 2 of 3	
PURPOSE OF PROPOSED ISL (i.e. CRITERIA MET):	<i>As per policy, within any ISL application it must be clearly demonstrated that one or more of the following criteria is met. Therefore, please indicate all that apply and supply in text box(es) below relevant information accordingly. Please be detailed and specific, expanding the box size as required.</i> <i>Where available a link to the full programme for the proposed ISL event should be provided.</i>
CRITERIA 1: ISL is for where a course or activity is part of college curriculum/guidelines on required training where it has not been possible to acquire competences within the UK.	
CRITERIA 2: ISL is for where a course is set out as a mandatory requirement of college training to reach the required qualification to practice where it has not been possible to acquire within the UK.	
CRITERIA 3: ISL aligns to specified areas of Personal Development Plan (previously discussed and agreed with your Educational Supervisor), detailing why this cannot be acquired within the UK.	
CRITERIA 4: ISL is for the presentation of significant research findings from within an NIHR recognised academic clinical fellowship or clinical lectureship.	
CRITERIA 5: ISL is for the presentation of research undertaken as part of a clinical training programme.	
INTERNATIONAL STUDY LEAVE FORM	

Page 3 of 3	
OVERALL, HOW WILL THIS EDUCATIONAL EXPERIENCE BENEFIT YOU? <i>Please be detailed and specific, expanding the box size as required.</i> (e.g. refer to aims of ISL experience, your identified learning needs in PDP, etc.)	

Please now attach the completed Pro-Forma to your ISL application on Accent Leave Manager before submitting for approval.