

## Health Education England – Thames Valley Study Budget FAQs

If you have a question which is not covered in the examples below, please email it to [studyleave.tv@hee.nhs.uk](mailto:studyleave.tv@hee.nhs.uk). Please note that the specialties used are for illustration, but the principle applies to any programme. All trainees must refer to the essential/desirable course lists produced by their school when applying for study leave/budget: [http://www.oxforddeanery.nhs.uk/about\\_oxford\\_deanery/medical\\_and\\_dental\\_policies/study\\_leave.aspx](http://www.oxforddeanery.nhs.uk/about_oxford_deanery/medical_and_dental_policies/study_leave.aspx)

***I have heard that the contribution towards accommodation costs has been increased. Can I really book rooms at over £100 a night for UK or overseas courses/ conferences?***

HEE has agreed to match the ceilings set by NHS Employers for accommodation costs associated with specialty recruitment arrangements. However, HEE expects that trainees will look for competitively priced accommodation through portals such as Doctor in the House, Airbnb or value for money hotels such as Premier Inns and Travel Lodges. Funding for accommodation is met from the Study Budget, and therefore expensive accommodation will deplete funds which would otherwise be available for other training opportunities. The Trainee Advisory Committee (TAC) at HEE TV have unanimously recommended to advise trainees to be mindful of this when booking accommodation. Trainees are reminded that accommodation associated with a one-day course will not normally be reimbursed, and there are strict parameters relating to accommodation when overseas.

***Can I claim for more than my original estimates for travel / accommodation?***

You are expected to research travel options before submitting an application, ensuring that you can arrive at the destination for the start of the event on the day, or factoring in travel and accommodation on the preceding day if necessary. You should give realistic values for travel and accommodation costs, and HEE requires you to obtain the best value available when making the booking. Remember that cheapest deals often have longer lead-in timescales than bookings made at the last minute.

Any rise in costs once funding has been agreed MUST be supported by a validated explanation for the increase: this might include proof from a rail operator or airline that the original service has been cancelled / suspended and that a rebooking will be necessary, or a doctor's certificate if illness is cited as a reason for delaying travel (personal health or that of a family member). Ideally this will be submitted to both your employing Trust study leave officer and to [studyleave.tv@hee.nhs.uk](mailto:studyleave.tv@hee.nhs.uk) before you participate on the course.

No reimbursement can be made without receipts for the actual cost incurred.

***I am a dental trainee. Can I get study budget from this centralised fund?***

Dental trainees, and public health trainees are not covered by this arrangement.

Dental trainees are covered by the new Dental Study Leave policy:

[http://www.oxforddeanery.nhs.uk/dental\\_school/dental\\_study\\_leave\\_new.aspx](http://www.oxforddeanery.nhs.uk/dental_school/dental_study_leave_new.aspx).

Public Health trainees should apply to their employer for both leave and funding from their study leave budget.

***What can I claim in relation to my Royal College / Specialty exams?***

**You may claim** for one revision / preparation course per part of your exams necessary for training progression / specialist register application. These courses MUST be UK based and have a classroom / workshop component.

**You cannot claim** for exam fees, travel to the examination venue or accommodation near the exam venue, nor can you claim for subsistence. Online only courses are not covered, nor are textbooks.

***I am a CT1 trainee in Psychiatry and want to attend the RCPsych Electroconvulsive therapy team day - how do I know if this is aligned with the curriculum and will be covered by the study budget?***

Any courses required to support you achieving the curriculum, are covered by the study budget. Discuss any courses/educational activities you would like to attend with your named CS /ES/TPD and they will be able, to advise and support your application if it is appropriate.

***I am a FY2 trainee and about to start a rotation on the neonatal intensive care unit. As part of my rotation I am required to complete Neonatal Life Support – will the study budget cover this?***

No – As an FY2 trainee this course is required for your service commitment and does not fall within your curriculum. The NHS Trust should provide funding for this training.

***I am a LTFT ST4 trainee in Respiratory medicine and am concerned that I will not be able to access study leave in the same way full-time trainees do?***

Please be reassured that LTFT will have access to study leave and the study budget in an equitable way.

***Do I need to complete my Statutory and Mandatory training prior to obtaining study leave, or attending non Statutory and Mandatory events?***

It is important that Statutory and Mandatory training is undertaken, however it is a matter for the Trust to decide if authorisation and attendance can be granted prior to the completion of the Mandatory or Statutory training.

***Do I need to complete my curriculum ‘essentials’ before applying for funding for a place on an ‘aspirational’ course that will strengthen my cv and enhance prospects for future appointment?***

Yes. You should discuss your PDP (personal and professional development plan) with your ES at the start of each placement. It is vital that you identify the essential goals for the placement and map how these will be achieved, as a failure to do so may prevent you getting an outcome 1 or 6 at the end of the placement. You are advised to identify which elements are delivered in local and regional teaching, and ascertain what ‘essential’ courses, if any, need to be provided externally (e.g. by your Royal College), and apply early for funding.

***I am about to start a research post in diabetes and endocrinology, but plan to do locum shifts regularly as a medical registrar in Oxford. My ALS will need updating later this year. Can I claim the cost from HEE?***

If you are OOP(R) then you cannot access the study budget for funds to cover this training. If you have an honorary contract with any hospital, which stipulates that you will be performing regular clinical activities, you are expected to comply with the mandatory training requirements set out by the employer for medical staff in such roles. The employer is required to provide this training at their cost. If you are working through an agency, you are considered 'self-employed' and the onus is on you to demonstrate you have the skills required by prospective employers.

***I am ST5 in O&G and would like to attend an overseas conference this year. Is this OK?***

The national HEE Study Leave group have agreed that trainees should have the opportunity to attend an **overseas conference during training to present work** you have completed. The proviso is that the doctor is otherwise 'on track' with their training requirements, and additional trips will not be met in full, if at all. The agreed frequency is once in every three years.

Higher trainees (usually within 12-24 months of their CCT) may wish attend one **conference during this phase of training as a delegate**, and your TPD can advise on those most suitable. This is not a mandatory requirement, nor an automatic right for any trainee to exercise, and there is no guarantee that such trips will be fully funded.

***I am a trainee in paediatrics and have been invited to present a paper / poster at an overseas meeting. Will HEE TV cover the costs for me?***

HEE TV will need confirmation that your invitation to present your work was after a competitive or peer reviewed process. Your Head of School may request a formal reflective learning log / report after the event. Nationally HEE wishes to support trainees who are presenting work after peer reviewed selection processes. We may not, however, be able to fully fund such trips as these remain 'discretionary' rather than 'essential for curriculum progress'.

***I am a surgical trainee and would like to attend a workshop on anastomosis. I've seen one advertised Denmark, which has a really good reputation. Is this OK?***

There is currently only one group of trainees who may attend a training course overseas without additional enquiries: these are plastics trainees who need to do microvascular anastomosis on live subjects, who may go to Europe or India, but not the USA.

For other trainees, if this course is in your curriculum, then there should be something available in the UK. HEE expects doctors in training to attend high quality UK courses, not to seek similar programmes overseas unless these are provided at a more economic overall cost. Anything over £700 in the UK and all overseas trips will need the support of your TPD. More costly overseas training courses will be refused unless 'time critical' and then be capped at a value similar to the total spend for a UK based one.

If you choose to go overseas, and this is approved, you will not be funded for additional overseas travel for conferences etc for three calendar years as this breaches national guidance on the frequency of overseas study leave being funded from the SL budget.

***I have had a paper accepted to present at a conference overseas. Can I claim for visa costs and vaccinations?***

HEE TV will not pay for either visas or vaccinations.

***I want to attend a one-day workshop at the Royal College of Surgeons in Edinburgh, necessary for me to achieve an essential 'sign off' in my portfolio. It isn't available in London this year. Do I need to ask HEE TV for permission to fly somewhere in the UK?***

We do not need to approve flights to destinations within the UK: therefore, flights to meetings in / near Edinburgh, Glasgow, Inverness, Aberdeen and Belfast can be booked, subject to you having had educational approval and granting of leave confirmed.

***I am doing a two-day course in (e.g.) Bristol. Can I stay overnight and get accommodation covered by HEE TV?***

If the total travel time from the course venue to the address HEE TV have on file for you is predicted by journey planning software using the shortest feasible modes and routes to be excess of two hours each way, then we will support the cost of overnight accommodation during the course, subject to the limits in Annex A, if you would prefer that to commuting and reclaiming travel costs. We do not want to make delegates over-tired by prolonged commuting whilst engaged in approved study leave.

***I am attending a workshop in Glasgow in July. Can I add a few days of annual leave as I would like to visit the Isle of Skye for a few days afterwards. Will HEE TV cover both flights?***

We have asked the NHS Counter Fraud Office for guidance on this topic. It is clear that HEE TV will not fund expenses associated with onward travel, subsistence or accommodation. We will refund to the value of travel to and from the event on the dates you would have travelled had you not added holidays on to your trip. The HMRC have taken a keen interest in consultants and GPs who add personal leisure elements to professional trips, to ensure they do not claim to offset personal expenses against allowable benefits.

***I am final year trainee in Radiology, have completed FRCR and achieved my required competencies. I would like to apply for funding to attend a quality improvement workshop – will the discretionary study budget cover this?***

Yes – this is the type of course to add value to you individually and the wider NHS Discuss your plans early with your ES/TPD and apply.

***I am a geriatrics ST4 trainee currently on maternity leave. I would like to do an ALS course, preferably just before I return to work - this will most likely be around October but the exact date has not been finalised yet. There is a course running at the end of September which would be appropriate. I wanted to enquire if I applied for this course would I be eligible to claim for it on my study budget, even if it is before I have officially returned to work?***

This is a curriculum requirement and furthermore is very much in line with Supported Return to Training so should be supported. You can use one of your KIT (keeping in touch) days for this activity.

***I am a trainee who is undertaking an expensive course that my course organiser advised me to do. I paid for the first two modules in December 2017, but the course is over a series of months going into this financial year 2018-19, i.e. after the budget changes came into force. Surely I can claim the whole amount?***

A Master's might have been suggested but programmes leading to higher qualifications, e.g. PG certificates, Diplomas or Master's should only be funded if required for your curriculum attainment, e.g. Clinical Oncology, where trainees are required to attend a day release ICR course in London, 38 sessions a year for two years at a cost of £2145 a year. This is clearly curricular in nature and should be funded in full, including travel costs (usual caveats of cheapest possible fare etc.). HEE TV will fund costs from 6 April 2018-19 if the course was commenced prior to the change in funding arrangements and has ongoing costs for modules to be met, but we will not retrospectively cover costs of the programme before 6 April 2018 as these were covered under different arrangements

If the course can be voluntarily extended to a Diploma or Master's qualification, HEE TV will not support this extra year cost.

***I am OOPT in Bristol and have an OXF training number. Can I get study budget and how do I apply?***

You are entitled to funds for study budget but you must use HEE TV forms and get your TPD in HEE TV to sign the forms. Please ensure you have requested leave from the department you are training in as well, and submit receipts using the approved internal processes, to whichever Trust is paying your salary so that expenses incurred can be reimbursed through payroll.

***Can I hire a car to travel to a course? Public transport to the venue would involve a cycle ride then two trains and a transfer of six miles at the other end. I would arrive too late for the start of the event, and don't really need to stay overnight, which is the other option.***

If you prefer to hire a car, then that is your choice: we would reimburse to the value of the cost of public transport and necessary connections.

***I am due to attend my annual ARCP soon. I am based in Reading and have to travel to Oxford to be there, can I claim the costs via the study budget?***

No, travel costs incurred when attending your ARCP should be claimed through your normal Trust expenses scheme.

***I have to pay for my ePortfolio, does the study budget cover this?***

No, ePortfolio costs are your financial responsibility. This is also the case for any colleges, societies or associations that you wish to become a member of. All membership fees will be your responsibility.

***Can I attend more than one revision course for my specialty exams?***

You can attend one exam prep course per part of your exams. I.e. One for the first part, another for the second part (written or OSCE based) etc. We will not fund more than one course for the same stage of any professional examination.

***I would like to complete an online revision course (e.g. Pastest MRCP 2 Question Bank), can I claim for this?***

Question banks, books and audiobooks are not covered by the study budget.

***Part of my ALS course is now online. Can I claim time to complete this from my study leave allowance?***

If any course has an online element to be done as an integral part of the programme (without which you would not gain the necessary certificate confirming training) then you can request, and expect to be granted, time to complete this work. Please remember that standalone online courses cannot be funded from the study leave budget.

***I have booked a place on a course which falls on a weekend I would not be working. Do I need to apply for study leave time?***

You should request time even if a course falls over a weekend or zero day as study leave is considered 'working time', and you can ask for days in lieu to recompense you not having had rest over a weekend or zero day, as you and your employer risk breaching EWTD rules and the Junior Doctor contract with regards to exception reporting on hours if not.

***Am I allowed to request private study?***

Private study leave for the purpose of home-based revision will normally be taken within six weeks from the date of the exam and normally runs from Monday to Friday. Doctors in training may take up to five days. Only one period of private study leave per exam is allowed. Please ensure you provide proof of booking the exam to your local Study Leave Officer when submitting your application form.

Private study may be considered for writing up research as part of a PhD, subject to the same limit on days.

Foundation trainees must refer to their school specific study leave guide for information on private leave.

***I have completed training in respiratory medicine and have asked for a period of grace for six months. Can I go on a consultant interview preparation course during my period of grace?***

Doctors in Period of Grace have no access to study budget under any circumstances as by definition, they are no longer in training.

***Help! I have just received an offer of a place on a course tomorrow from the waiting list. I didn't submit an application form for Study Leave. Can I get my fees back?***

- Firstly, can you be released from work to attend? Please email the rota co-ordinator to ask for an email confirming this, and send that, with your offer of a place to the named contact for your employing Trust on the Study Leave application form. This is online on the Oxford Deanery pages.
- Fees will only be reimbursed if you then complete the application AND claim forms and submit required receipts, having alerted the named contact in your local Post Grad / Education centre team before the first day of the course.
- On your first day back after attending the course, please complete any remaining forms and send (email or post) to your local Study Leave team as soon as possible (they should be expecting it if you sent the alerting email before going on the course).
- No fees will be reimbursed if more than twelve weeks elapse between a course and claim being submitted.

***Remind me what the budget does NOT cover?***

This budget does not cover:

- Textbooks, including revision / exam prep aides
- ePortfolio registration costs
- Subscriptions to journals (paper or online)
- Subscriptions to any online material (webinars, stand-alone educational programmes, revision programmes / mock exams)
- Membership fees (Royal College or any specialist society)
- Examination fees
- Travel or accommodation costs associated with examinations
- Travel for 'regional/Calman teaching' (this is covered by the arrangements for trainees to claim for travel to units other than their nominated base hospital during their training programme)
- Travel to attend ARCP (as above)
- Any claim for which a receipt cannot be produced