



KMC/STUDYLEAVE.LETTER

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22 June 2004

To : All trainees eligible for West of Scotland Study Leave /
WOS Postgraduate Tutors / Specialty Advisers

Dear Colleague

WEST OF SCOTLAND STUDY LEAVE FUNDING

Background

Since 1997 the West of Scotland has had a system of individual study leave budgets. For a number of years the individual budget allocation and the rules governing carry forward and carry back levels have not changed.

During these years there has been a substantial increase in the number of trainees entitled to study leave funding with an insufficient increase in the West budget to meet the extra demand, leading to an overspend. NHS Education for Scotland (NES) has undertaken a national review of study leave funding and study leave budgets will now be allocated throughout NES on the basis of a notional annual budget of £500 per SHO and £750 per SpR. The West budgets have to fall in line with this national allocation.

West Study Leave System from 1st August 2004

Annual Allowance

The West will allocate a current year individual budget using the NES notional budget figures of £500 for SHOs and £750 for SpRs but will add a **discretionary** top up for the current financial year to bring SHOs up to £720 and SpRs up to £840. Finances permitting, we will allocate future years' budgets on this basis although the level of the top up is discretionary and may be changed.

Carry Forwards and Carry Backs

Carry forwards and carry backs will now be restricted to 6 months of the notional budget figure. At any period in time the maximum that can be sitting in any trainee's budget is as follows:

<u>SHO</u>	<u>SpR</u>
current year budget £720	£840
maximum carry forward £250	£375
maximum carry back £250	£375
Total (subject to contract duration)	£1,220
£1,590	

Cont/.....



Timing of Spend tied to Date of Leave

The trainee will need to ensure when he / she applies for funding for a course that there will be sufficient funds in his / her budget on the date of the course. The funds available are therefore dependent on the funds which will be in the trainee's budget at the time of the course rather than on the date when the application itself is made. The onus is on the trainees to monitor their own budget and to ensure that their planning of courses takes account of the above factors.

Trainees currently in System

Trainees who have higher than these maximum funds sitting in their budgets at the moment will have to use the funds by 1st November 2004. At this time budgets will be adjusted to reflect the maximum figures as stated above. Any use must comply with the provision above.

Less than Full Time Trainees

The annual budgets and carry forward amounts will be reduced pro rata to the full timers and they will be subject to the same rules as above.

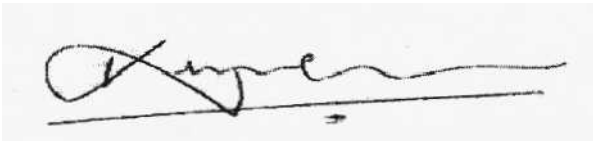
Study Leave Guidelines

There is currently a NES national group revising standard study leave guidelines so it is possible that there may be some alterations to them in the future but at the moment the only changes to the guidelines are as regards the budget details stated above. Guidelines can be found at:

http://www.nes.scot.nhs.uk/medicine/study_leave/west/guidelines/

Any queries regarding the above details please contact Stuart Brown, Administrative Officer (Study Leave) - details as above.

Yours sincerely

A handwritten signature in black ink, appearing to read 'Kenneth M Cochran', written over a horizontal line.

Kenneth M Cochran
Postgraduate Dean

STUDY LEAVE GUIDELINES INFORMATION SHEET

Entitlement

Trainees receive a current year individual budget using the NES notional budget figures of £500 for SHOs and £750 for SpRs but will be allocated a **discretionary** top up for the current financial year to bring SHOs up to £720 and SpRs up to £840. Finances permitting, we will allocate future years' budgets on this basis although the level of the top up is discretionary and may be changed.

SHOs in a 6 month post will receive £250 plus a discretionary top up of £110. Study Leave days for SHOs are 15 days per 6 months and for SpRs 30 days per annum.

Carry forwards and carry backs will now be restricted to 6 months of the notional budget figure. Unused budgets cannot be transferred between regions, when moving from SHO to SpR or from SpR to any other Grade. At any period in time the maximum that can be sitting in any trainee's budget is as follows:

	<u>SHO</u>	<u>SpR</u>
current year budget	£720	£840
maximum carry forward	£250	£375
maximum carry back	£250	£375
Total (subject to contract duration)	£1,590	£1,220

Application Process

UK Study Leave can be used for Courses, Conferences, Meetings and Private Study Leave subject to local negotiation. Travel and Subsistence for Exams can be reimbursed but **not** Exam fees. Distance Learning and Internet courses cannot be reimbursed from Study Leave. Masters and PhD courses **cannot** be funded through Study Leave.

Application forms can be obtained from your Postgraduate Tutor's Administrator. (See overleaf)

Application forms **must** reach your Postgraduate Tutor before the study leave starts. Retrospective applications will only be approved under exceptional circumstances*.

Once completed, application forms **must** be signed by your Clinical Director/Consultant/Head of Department (to grant you the time off) and your Postgraduate Tutor (to confirm the study leave is educationally relevant). Forms are then forwarded to NHS Education for financial approval.

If approved, a claim form is sent. Then, and only then, are receipts to be attached and returned for processing. Receipts sent with the application form will be returned and the claim delayed until a claim form has been properly completed.

Study Leave **must** be applied for even if no money is involved, no personal reimbursement sought or the study leave is on a weekend or you are off duty.

When ticking "with" or "without" expenses please note that the Course fee is classed as expenses even if you are selffinancing or unit financing. Expenses must be estimated as accurately as possible, if particular expenses are not estimated (eg Subsistence costs) no reimbursement can be sought.

Claim Process

Claims can be submitted at any time once the application for study leave has been approved by NHS Education but must be returned no later than **3 months** after the study leave has finished. Claims received after that will be returned unless there are exceptional circumstances* as to why it is late.

Subsistence costs can be claimed up to a maximum of £75 per night for Bed & Breakfast plus up to £20 for meals in a 24hour period. Course dinners are paid at £20 + a discretionary amount (non-negotiable) depending on the full cost.

Invoices may be arranged to be sent to **NHS Education for Scotland** by the course organisers, but will not be paid until a fully completed study leave application form has been approved.

If you have been unable to attend a course, the course has been cancelled or do not intend to claim any expenses, we would be grateful if you could let us know so your Study Leave budget record can be amended accordingly.

Overseas or Prolonged Study Leave

Overseas or Prolonged Study Leave must be applied for at least 3 months in advance. Late applications run the risk of not being granted. Courses Overseas are not eligible for funding. Overseas Leave cannot be longer than 2 weeks in duration.

Separate Overseas forms are available from NES only, for Conferences and Meetings where a presentation is being given. Overseas Leave is discretionary and is reimbursed at 60% of the total costs to a maximum of £300 deducted from your study leave budget. Overseas leave with expenses will only be granted once in any contractual year.

Please note citing previous occasions where funding has been approved will make no difference to the decision as procedures have now changed.

GP Registrars

GP registrars who held a SHO post in this Region immediately prior to appointment **do not** have access to any unspent study leave budget.

Eligibility

Those not eligible for study leave are; West of Scotland trainees working out with the Region, trainees in a non-substantive training post, Research Fellows, Locum Appointments (Service) and GP Registrars.

***Not being aware of study leave procedures does not constitute exceptional circumstances.**

Contact Details

The following address and details should be used for all study leave enquiries, correspondence and Invoicing purposes.

Stuart Brown
NHS Education for Scotland
West of Scotland Region
3rd Floor, 2 Central Quay
89 Hydepark Street
Glasgow
G3 8BW

The full Study Leave Guidelines information can be found on our website at the following address:

www.nes.scot.nhs.uk

Once there, click on Medicine then click on Study Leave, next click on Study Leave in the West Region and finally click on Guidelines for West Region.

Tel:01412231536 Fax:0141 223 1514 [Email:stuart.brown@nes.scot.nhs.uk](mailto:stuart.brown@nes.scot.nhs.uk)

Postgraduate Tutors and relevant information is detailed below. Psychiatry trainees should contact their college tutor.

HOSPITAL	POSTGRADUATE TUTOR	ADMINISTRATOR	PHONE NUMBER
Ayr Hospital	Dr S K Ghosh	Mrs Elizabeth Reid	01292 6-10555 ext 4123
Crosshouse	Dr H Neill	Mrs Sandra Hewat	01563 577500
Dental Hospital	Dr A Wray	Mrs Irene Gilbey	0141 211 9710
Dumfries & Galloway	Dr R Simpson	Ms Sheila Martin/ Ms Jennie Pawson	01387 241593
Falkirk Royal Infirmary	Dr D McQueen	Mr Mark Ullrich	01324 616169
Glasgow Royal Infirmary	Dr J Fox	Mrs Sandra Clubb	0141 211 5413
Hairmyres Hospital	Dr J, Keaney	Mrs Liz Brown	01355 585484
Inverclyde Royal	Dr D Marshall	Mrs May Campbell	01475 633777 ext 4523
Lom and Islands	Dr A K Henderson	Ms Fiona Jackson	01631 567511
Monklands Hospital	Dr W T A Todd	Mrs Rosemary Kelly	01236 712570
Royal Alexandra	Dr W S Hislop	Mrs Marian Hopcroft	0141 580 4121
Southern General	Dr W Reid	Mrs Liz Johnstone	0141 201 2165
Stirling Royal Infirmary	Mr I Ritchie	Mrs Lottie McKie	01786 434103
Stobhill Hospital	Dr R Milroy	Mrs Jean Elliot	0141 201 3595
Vale of Leven	Dr J Series	Ms Juliet Brown	01389 603843
Victoria Infirmary	Dr J Potter	Mrs Mary Smith	0141 201 5762
Western/Gartnavel	Mr D Byrne	Mrs Laura Wells	0141 211 2034
Wishaw General	Dr I Gunn	Ms Sheona Everett	01698 366755
Yorkhill Hospital	Mr R Carachi	Ms Kay Byrne	0141 201 0170