NHS England South West

Postgraduate Medical Education

Study Leave Guidance 2026/27

Version 1.6

Welcome

Individual study leave funding is available to support the achievement of competences as defined by the specialty curricula. Resident Doctors should ensure that curriculum requirements are relevant to their specialty and stage of training to claim for time and funding. Discretionary activities should be registered on their PDP (personal development plan) in order to claim time and funding as appropriate and should be discussed with and approved by their Training Programme Director (TPD).

The Study Leave Guidance and Course List (updated August 2026) provides the relevant information for Resident Doctors when claiming study leave. There is also a school's Annual Development Plan which references regional training courses planned for the next academic year; the reference number should be used when/ if requesting time and claiming any reimbursement for attending these courses.

Resident Doctors should apply for study leave time and reimbursements through their employing Trust and work to the Trust policy for claims.

The principles, application process and funding allowance within this guidance takes precedence over any categorisation of any named course on the course list.

Any queries Resident Doctors have regarding Study Leave should be directed to the Postgraduate Medical Education Team at their Trust.

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Introduction

This guidance sets out the reviewed study leave arrangements for all Resident Doctors who come under the remit of the Workforce, Training and Education Directorate for NHS England Southwest. Throughout this document referred to as NHSE SW.

It applies from the 01 August 2026 for all eligible Resident Doctors and supersedes any other guidance.

The August 2025 Study Leave Guidance applies for all applications submitted up to the 31 July 2026.
The principles for Study Leave apply across all specialties. However, the processes for Foundation, Primary Care, and Dental are managed differently. Please refer to the NHSE SW website for more detailed information relating to these specialties.

Any changes to local and/or national policy or practice will be amended through this guidance and updated accordingly.

National Guidance

The national guidance underpins our regional guidance. To access the national guidance, **please click here**.

Public Sector Equality Duty

We will review this guidance annually and following any changes to national policy as they occur to ensure that this guidance will not have an adverse impact on any Resident Doctor groups.

Acronyms

Letters	Meaning	Description
RD	Resident Doctor	Resident Doctors are classed as those on a national NHSE training programme.
ES	Educational Supervisor	ES are responsible for supporting Resident Doctors to plan their training and achieve agreed learning outcomes.'
TPD	Training Programme Director	TPD are responsible for managing the specialty training programmes, ensuring they deliver the specialty curriculum.
HoS	Head of School	HoS role is to advise and support in their role of commissioners of the educational programmes.
PDP	Personal Development Plan	PDP is a structured process to help develop and enhance knowledge, skills and experience to progress further in a career.
ADP	Annual Development Plan	ADP for each school provides an overview of any planned regional teaching. Each event has a related reference number.
NHSE SW	NHS England South West	Funding approvals. Senior Panel for approvals of Overseas and >£1000 application requests in line with the Study Leave Guidance. Email Address: **england.studyleave.sw@nhs.net**

Principles of Study Leave

NHSE South West - Workforce, Training and Education Directorate is committed to:

- Ensure every Resident Doctor has the opportunity to gain the competences relevant to their level of training as defined in each curriculum. This means that the NHSE SW Study Leave Team will direct funding towards curriculum delivery as a priority.
- Improve quality and access to study leave and curriculum support.
- Work in collaboration with our Trusts, Educators and Resident Doctors.
- Ensure equity of access to relevant education and development opportunities required by curricula.
- Support delivery of courses and learning opportunities which are explicitly required by the relevant curriculum.
- Provide support, in line with the guidance, for other reasonable education and development opportunities, relevant at the time of a Resident Doctors training programme and which have been considered significant as part of a Resident Doctors personal development plan (PDP).
- Ensure a course list, provided by the school and specialty, to enable Resident Doctors to manage their study leave appropriately.
- Requests for study leave where the course fees cost in excess of £1000 must be discussed in advance with the Resident Doctors TPD. They will also require NHSE SW approval.
- NB - This does not include overseas courses, postgraduate courses or higher qualifications. Please refer to these subject areas separately in the document.

It is important that the Resident Doctor:

- Refer to the provided course lists by their specialty to access funds.
- Take responsibility to ensure that training opportunities are accessed at the relevant time in their training and when it is most appropriate to the needs of the training programme.
- Attend courses virtually or based in the South West wherever possible in order to make best use of funds.
- Should discuss their curricula and personal study leave requirements with their ES and/or TPD at the start of each placement and at each educational review to ensure requirements are relevant.

General Study Leave Information

Study Leave Applications

- It is the responsibility of the Trust to ensure that study leave claims are managed according to the guidance.
- Requests for study leave time and reimbursement should be made through employing trust's application process (excluding Overseas Study Leave)
- The course list should be consulted for approved/acceptable courses to attend
- As described in the Overview of Guidance section, all applications must be prospective. For clarity, submitted prior to the course taking place and in an ideal world, also approved as there may be times when applications are not approved and the Resident Doctor must bear the cost of the activity.

Expectations

- While not compulsory, statutory and mandatory training should be completed before study leave can be approved.
- Study leave days are taken as part of the Resident Doctors working days. If it is necessary to take them on non-working days (e.g. weekend or rostered days off), then time in lieu should be agreed with the ES at the time of agreeing the study leave, within reasonable time frame of the activity. Special attention should be given to ensure that the Resident Doctor does not breach their contract requirements on hours worked or European Working Time Directive (EWTD).
- Resident Doctors should not commit to costs for any course or event until full approval has been received following the Trust's application process. Any costs incurred prior to approval will be borne by the Resident Doctor.

Queries

- General queries (except Overseas Claims) from Resident Doctors that come directly to NHSE SW will be re-directed to the employing Trust office to respond.

Reimbursements – Resident Doctor

- Reimbursements will only be made where study leave days have been used.
- We are unable to reimburse courses when special interest days or annual leave days are used.
- Reimbursements will be made through the employer's payroll process following attendance at the course/event. With the exception of Primary Care Resident Doctors in a practice setting.
- Reimbursements may only be approved once proof of receipts are submitted to the Trust in line with this guidance.
- Reimbursement submissions must be submitted NO LATER than 3 months, with the expected timeframe being 6-8 weeks after the event. This is in line with NHS Financial Regulations and NHS Terms and Conditions. Any claim after this deadline will not be approved.

Unable to attend

- If attendance to a course/event is not possible due to ill health and the Resident Doctor is unable to recover some or all of the advance costs, the Resident Doctor should inform their Trust's administrator in accordance with their Trust's policy. The TPD or HoS will be required to determine the legitimacy of the reasons and make the final decision for payment. Comments will need to be added to the monthly return to NHSE SW Study Leave Team.
- If attendance to a course/event is not possible due to the Resident Doctor's employer requiring them to work, the cost will be met by the employer.

Moving Trusts

- Resident Doctors are able to be reimbursed if they move one from Trust to another providing they originally complied with the guidance and their current Trust's application process to secure a place at an event or training course. It is also advisable to ensure that they discuss this with their rotating Trust to ensure they are aware of any potential reimbursement claim.

Time for Study Leave

Annual Entitlement Days

- Resident Doctors will have an annual entitlement of 30 days, with the exception of Foundation Year 1 who have an annual entitlement of 15 days.
- Resident Doctors who are on Less Than Full-time (LTFT) contracts will have their study leave allocated pro-rata
- For Resident Doctors at Foundation Level 2 or higher, schools may have an agreed number of days (from the allocation above) set aside for regional/local teaching. Resident Doctors will need to discuss this with their Training Programme Director/Head of School. Time off will still need to be applied for in accordance to the employing Trust's procedures.
- Unused study leave entitlement cannot be carried forward to the next leave year.

Uses of Annual Entitlement

- Resident Doctors may use their Annual Entitlement for the following activities:
- Local/Regional Teaching
- Undertake approved external courses in line with the course list
- Periods of sitting (or preparing for) an examination for a higher qualification where it is a requirement of the curriculum.
- Private study leave – up to 5 days from a Resident Doctors annual entitlement. This is to be used to support private revision but only where this fits in with the policies and service requirements of the department in which they are employed at the time of the study leave. Resident Doctors need to be mindful of any impact of their taking private study leave on colleagues sitting the same exams.

Annual Entitlement – Allocation Period

- For the purposes of allocating time for study leave, each Resident Doctors study leave year runs from the changeover date of their programme to the changeover date in the following year (e.g. for programmes with nationally agreed start dates in August, the leave year is from the first Wednesday in August until the last Tuesday in August the following year).
- Resident Doctors who start or complete their training part way through the study leave year will have a pro-rata entitlement until the end of their programme's leave year.

Parental Leave

- Where a doctor takes 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". The accrual of study leave will depend on the requirements of the curriculum for the individual's stage of training and to ensure the needs of service delivery can safely be met.

Resident Doctors who have reached CCT

- The entitlement to Study Leave ends once a Resident Doctor achieves CCT.
- Individuals within a Period of Grace are not eligible for funding from the study budget as these funds are to be used for meeting Certificate of Completion of (Specialty) Training requirements.

Roles and Responsibilities

Resident Doctor

Educational Supervisor

Head of School and Training Programme Director (HoS & TPD)

The Trust's Postgraduate Medical Education Team

NHS England South West (NHSE SW)

Resident Doctor

Overview

- It is the responsibility of the Resident Doctor to ensure that they have familiarised themselves and adhere with study leave guidance and procedures set by NHS England Southwest and their Trust

Personal Standards

- Should prioritise their application for study leave in line with their needs at the point of training and consider the integrity of the requests for training which are not aligned to their curriculum requirements.
- Must meet the standards expected of them, in accordance with their obligation to demonstrate professional integrity, when applying for a course, event or conference.
- Will be expected to adhere to the NHS Financial Regulatory Terms and Conditions when submitting a claim.

Applications for courses

- Should ensure they apply for local approval of study leave prospectively and in good time after discussion with, and the approval of, their ES (or TPD or HoS where applicable) in line with the Trust and NHS England South West's procedures.
- When applying for time off in advance, approval for the time must be approved by the postgraduate doctor's Rota Coordinator (or equivalent).
- Should not commit to the costs of any course activity or events until the full approval has been received. Any costs incurred by the Resident Doctor without having prior approval will be borne by the Resident Doctor.

Reimbursements

- Resident Doctors should provide proof of receipt in line with the Trust policy for other courses for which they are claiming study leave time and/or costs.

Rotating to a different region

- Where a Resident Doctor rotates to a different region, they will follow the study leave policy/guidance of that region.

Educational Supervisor

Study Leave Guidance

- To familiarise themselves with the guidance and procedures set by NHS England South West and their local Trust. This includes the course list for their speciality.

Study Leave and the Resident Doctor

- To discuss personal development plans which are aligned to the postgraduate doctor's needs at that time in their training. All mandatory training should be completed prior to any approval for study leave.

Applications for Study Leave

- To ensure they enact the guidance in line with the requirements and liaise with the TPD and HoS to ensure there is clarity in the decision-making and approval process.
- To ensure courses/educational activities are approved at the right time in training.
- To verify the postgraduate doctor has met the core curriculum requirements before approving study leave.
- To authorise study leave in a timely manner as applicable.
- Not to approve retrospective requests for time nor payments under any circumstances.

Head of School and Training Programme Director (HoS & TPD)

Applications for Study Leave

- To offer advice, clarification and approval for study leave if required e.g. for Discretionary activity
- Discretionary activity should only be approved if the core competencies are being met satisfactorily.
- Assess where a course or equivalent is available locally or regionally, funding should only be approved in truly exceptional circumstances for a postgraduate doctor to undertake the course elsewhere.
- To work collaboratively with NHSE SW to ensure that study leave funding is managed with integrity, according to the principles of this Guidance, ensuring equity and fairness is applied in the process.
- Deviations from study leave guidance can be discussed with the Head of School, who can make a discretionary decision in conjunction with the NHS England South West Study Leave team.

Courses, Course Lists, and Annual Development Plans

- To work collaboratively with TPD and/or ES to assist with identifying their educational training programmes, both local and regional.
- To provide support to update the course list for their speciality on an annual basis.
- It will be the responsibility of the HoS to provide NHSE SW with their Annual Development Plan and NHSE SW will confirm to the HoS the funding allocated to support these courses. Each course will have a unique reference number and must be included against the expenditure on the monthly return. (Resident Doctors should be able to gain access to the unique reference number on the NHSE SW website for regional teaching days if they wish to self-certify attendance and claim any expenses related to that event).

The Trust's Postgraduate Medical Education Team

Overview

- It is the responsibility of the Trust, as an employer to ensure Resident Doctors have been inducted into the Trust and have been provided with the Trust Policy and process on how to request study leave and claim reimbursements.

Study Leave Guidance

- All staff involved in the approval of study leave must ensure that they are familiar with and follow NHSE SW Study Leave Guidance. This is essential if we are to ensure that study leave funding is allocated in a fair, equitable and consistent way.

Allocation of Study Leave

- Ensuring probity of allocation, expenditure and approval is applied equitably and fairly.
- Ensuring funds are allocated correctly and to support delivering quality educational activity that meets the Resident Doctor and local needs.
- Ensuring the Study Leave process is fit for purpose.
- The Trust will ensure that Less Than Full-time (LTFT) and academic Resident Doctors will have equitable access to study leave.

Parental Leave

- Where a Resident Doctor takes Parental Leave, the Trust will ensure that their entitlement to study leave continues, this may be taken during 'keeping in touch' (KIT) days or will otherwise accrue to be taken at a later date.

Payments and Reimbursements

- Ensure through discussion with clinical leads and/or process that payment is made appropriately and in a timely manner.
- It is the responsibility of the Trust to monitor and challenge these expenses prior to submitting them to NHSE SW on their Monthly Study Leave Return, failure to do this will result in the Trust having to reimburse the Resident Doctor.

Record Keeping

- Each Local Education Provider Education Centre is expected to keep a clear and concise record of all study leave time taken by individual Resident Doctor. This must be submitted in a timely manner on a monthly basis to NHSE SW.

Work in collaboration with NHS England South West

- Ensuring they provide to NHSE SW the information required as set out in this guidance.
- Working collaboratively with the Study Leave Oversight Group members and Trusts to ensure a mutually fair, transparent and equitable process is in place.
- Working collaboratively with the HoS (and/or TPD).

NHS England South West (NHSE SW)

Equity and Fairness

- To ensure that study leave funding is managed with integrity, according to the principles of the Study Leave Guidance, ensuring equity and fairness is applied in the process.
- To ensure requests for funding are considered on a case-by-case basis and budget allowing.
- Adhere to the conditions as set in the study leave guidance.

Appeals

- Process appeals in accordance with the process outlined in the Study Leave Guidance.

Annual Development Plans (ADP)

- To provide a unique reference number for funding approvals for courses on the ADP

Overseas courses

- To provide a unique reference number for funding for approved overseas funding requests.

Over £1000 courses

- To review and provide approval for courses over £1000

Further Education

- Postgraduate Certificates, Diplomas, Masters and PhD courses will not be funded under any circumstances.

Review the process

- Working collaboratively with the Study Leave Senior Panel to ensure the process is followed fairly, as stated in the Study Leave Guidance.
- Working collaboratively with the Study Leave Oversight Group members and Trusts to ensure a mutually fair, transparent and equitable process is in place.
- Continue to review the integrity of the process to ensure it is providing what is needed to process the study leave claims and payments.

Trust Monthly Returns

- Process the Monthly Returns provided by the Trusts for the purposes of reimbursement.

Updates to policy

- It is the responsibility of NHSE SW to update Trusts and Resident Doctors on any changes to the national principles for Study Leave.

Exceptions

Resident Doctors Out of Programme

Academic Clinical Fellows & Lecturers (ACF & ACL)

Foundation Resident Doctors

Primary Care Postgraduate Resident

Resident Doctors Out of Programme

Overview

- Resident Doctors on Out of Programme Experience (OOPE), Out of Programme Research (OOPR), Out of Programme Career Break (OOPC) or Out of Programme Pause (OOPP) are not entitled to study leave for the period they are out of programme.
- In general Resident Doctors Out of Programme are not entitled to study leave per se UNLESS it supports their training and contributes to their CCT. They can use their Keep In Touch (KIT) days for this and need to ensure they liaise with their medical HR team as well as their PGME centre, so their requests are processed.

Out of Programme Training

- Resident Doctors on Out of Programme Training (OOPT) are normally only entitled to study leave for this period if they are occupying a training post on a training programme.
- Applications for individuals on OOPT will only be approved and funded where there is clear evidence linking the application to the specific curriculum requirement (Essential courses only). Where uncertain, this will be at the discretion of the 'base' Postgraduate Dean or delegated Responsible Officer(s).
- The employing Trust will be responsible for the OOPT Resident Doctor and all claims should be made to them. Their course attendance should be captured on the NHSE SW Study Leave Return. If issues are encountered the study leave teams will work across the Deaneries to resolve so Resident Doctors should contact them directly in these rare instances. Please send queries to **england.studyleave.sw@nhs.net** with a subject heading "OOPT payment query"

Sick Leave

- Resident Doctors during times of prolonged leave such as sick leave are not eligible for study leave.

Return to Training

- It may be appropriate for Resident Doctors to access Supported Return To Training (SuppoRTT) funding/opportunities in preparation for returning from OOP/prolonged leave. **Please contact your Trust SuppoRTT Champion** for further information.

Academic Clinical Fellows and Lecturers (ACF & ACL)

Overview

- Academic Clinical Fellows (ACF) and Academic Clinical Lecturers (ACL) may access study leave to support the clinical component of their training and are therefore entitled to study leave on a pro-rata basis, in line with their clinical work allocation.
- ACFs and ACLs should only apply for courses related to postgraduate clinical training. Study leave related to academic research that is additional to the acquisition of the relevant GMC approved curricular competencies should not be funded by the Study Leave budget, but through the funding source for the resident doctor's academic research, for example, via the University
- ACFs and ACLs should apply for Study Leave Time from their employing organisation and in accordance with their policy.
- The same principles required for all Resident Doctors for reimbursement apply for ACFs and ACLs. This includes Early Reimbursement.

Academic Clinical Fellows

- ACFs should follow the same procedure for study leave and reimbursement as other Resident Doctors.

Academic Clinical Lecturers

- ACLs are employed by a university.
- **Approval for course -** To claim for Study Leave Funding the ACL will need to apply to the NHSE SW Study Leave Team (england.studyleave.sw@nhs.net) attaching their completed Trust or employer application form requesting study leave time with the details of the course etc. All applications must receive approval from the NHSE SW Study Leave team BEFORE any study leave is supported or reimbursed. Please use the subject heading "ACL Study Leave".
- **Reimbursement to ACL -** ACLs will be reimbursed for Study Leave Funding by their employer and should follow their internal processes for reimbursement of expenses.
- **Reimbursement to employer -** Following reimbursement, the employer will be required to submit an invoice to england.studyleave.sw@nhs.net with the subject heading "ACL Study Leave" with the following information; Name of ACL, name & date(s) of course attended and confirmation of the amount of Study Leave Funding paid. NHSE-SW will raise a PO and arrange payment.

Foundation Resident Doctors

Overview

- The legal requirements for study leave in the Foundation Programme (FP) are complex, as the arrangements for F1 and F2 doctors differ.

Principles of Study Leave

- The principle of study leave within the Foundation Programme (FP) is that professional leave or study leave should normally only be granted for the purposes of supporting the FP curriculum.
- For full guidance please refer to the **Foundation study leave webpage**

Primary Care Resident Doctors

General Principles

- Primary Care Postgraduate doctors should refer to the **Primary Care study leave webpage**

Overseas Courses

- Resident Doctors claiming for Overseas courses should follow the same process as mentioned in this guidance.

Course Information

Course List

Courses - Postgraduate and Higher Level

Exam Preparation and Revision courses (including Question Banks)

Exam Preparation - PACES Courses

Leadership and Management Courses

Peer Mentoring Courses

Life Support Courses

Step-up Courses

Train the Trainer Courses and Teaching Courses

Course List

Overview

- The course list is derived in partnership with the Head of Schools and Training Programme Directors alongside NHSE South West Study Leave Team.
- The Course list is reviewed annually and published in August each year. No changes are made after publication
- Any curriculum changes which are subject to change during the academic year will be added as an addendum to the website NOT the Course List or Study Leave Guidance.
- Important: Courses NOT on the course list will not be funded except for Discretionary courses, which are subject to specific criteria.

Purpose of the Course List

- The list provides courses deemed suitable for Resident Doctors at all levels provided they follow their Trust's Study Leave application process.
- It is important to note that NHSE and the Trusts will not compare the different specialty course lists.
- Resident Doctors are to only use their speciality's list when applying for course.

Current Course List

Course List August 2026 - July 2027 v2.4

Courses - Postgraduate and Higher Level

- Postgraduate qualifications are no longer in curricula.
- Postgraduate Certificates, Diplomas, Masters and PhD courses will not be funded under any circumstances.

Exam Preparation and Revision Courses (Including Question Banks)

Overview

- In the first instance, school based regional activities should be utilised. These can usually be found within the Regional Annual Development Plans.
- Where School-based activities are not available, one private external preparation activity or resource per exam would usually be funded capped at £600
- Only activities and resources that have Specialty School and Resident Doctor approval should be considered.

Types of Preparation and Revision Courses

- Face to Face activities
- Digital Resources
- Question Banks or other exam preparation materials.

Subscriptions

- Subscriptions to revision materials will be considered and will only be approved up to a maximum of three month's duration.
- Approval of subscriptions will be considered as a one-off activity and will require re-application for renewing if required.

Repeated Exam Attempts

- Funding of courses for repeated attempts at the exam should only be considered alongside other supportive actions to assist in passing the exam, ideally as part of a suite of support.
- Funding of additional further activities should not be considered except in exceptional circumstances at the discretion of the Postgraduate Dean or nominated deputy.
- When considering further funding additional activities, recommendation from the Professional Support and Wellbeing Team from NHSE SW (PSW SW) or the Dean/Deputy Dean, or HoS is required.

Exam Preparation - PACES Courses

Overview

- Resident Doctors should attend online or regional courses as a first point of need.
- Resident Doctors must have TPD sign-off to attend a PACES course. TPDs will be asked to consider the relevance of attending an external face to face PACES course before signing approval. If further review is required, approval should be submitted to the HoS.
- PACES courses are considered a revision course and therefore capped as such.

Eligibility

- A single PACES course will be approved and reimbursed where appropriate for Resident Doctors if:
    - This is part of their PDP as appropriate for their stage of training.
    - They cannot get the necessary experience within their usual work and training programme.
    - They have a place in the upcoming exam or a good chance of being prioritised for a place, based on the MRCPUK criteria.
    - They have ES support.

Leadership and Management Courses

Overview

- NHSE SW provide Resident Doctors with an opportunity to attend Leadership and Development courses throughout their training, therefore, leadership courses run by independent providers or as part of a school regional teaching programme will not be supported for funding.

NHSE Organised Courses

- A suite of Leadership and Management courses are available through the NHSE SW Faculty Development Team.
- These courses can be accessed via their booking system, **Maxcourse.**

NHS Leadership Academy

- A suite of Leadership and Management courses are available through the **NHS Leadership Academy.**

Peer Mentoring Courses

- NHSE SW provide Resident Doctors with an opportunity to attend Peer Mentoring and Mentoring courses throughout their training and do not fund these courses individually. These may be provided following NSHE-SW approval as part of the regional teaching programme for some specialties.
- **Please click here for further information on mentoring.**

Life Support Courses

Overview

- It is recognised that no specific course is required to achieve curriculum capabilities. The required capabilities can be effectively learned through a 'life support' course covering the required areas in sufficient depth.

Advanced Life Support (ALS)

- The Resuscitation Council UKs Advanced Life Support (ALS) is such a course that delivers these capabilities and has evidence to support an improvement in patient outcomes.

Attendance on a Life Support Course

- NHSE therefore supports the use of study leave funding to attend ALS courses, where the training programme believes it to be the most effective and efficient way of delivering the capabilities. Resident Doctors are encouraged to undertake the blended delivery 'e-ALS' for first time candidates and recertification for future attendance.

Funding

- Course fees will usually be reimbursed up to £300, this is the upper limit of what is considered to be a reasonable cost to run an e-ALS course.
- However, Deans' discretion should be used in individual cases where due to uncontrollable factors the cost is higher or a two-day course is required.

Employer Requirement

- In cases where the employer requires certification, but the capabilities have been achieved via other routes or are not required by the curriculum then it is expected that the employer will cover the cost.

Other Advanced Life Support Courses

Overview

- Other Advanced Life support courses (e.g. APLS, ATLS, EPALS) should be detailed in your specialty-specific course list
- Please check your specialty for specific guidance for these courses and reimbursement.
- If a course is not on your specialty course list, please discuss this with your TPD (Training Programme Director). It may be supported on a discretionary basis following NSHE-SW approval and Deans discretion if appropriate.

Step-up Courses

Overview

- NHSE SW will fund step-up courses as part of the regional teaching programme. These should be included on the annual development plan (ADP) as compiled by the TPD or HoS.

Exclusion

- NHSE SW are unable to fund step-up courses on an individual basis.

Train the Trainer and Teaching Courses

Overview

- Resident Doctors will be supported to attend one 'train the trainer course' during their training if this is approved by their ES, HoS or TPD. This will be fully reimbursed.

NHSE SW Educational Supervision Courses

- Educational Supervision courses from NHSE SW Faculty Development.
- There courses are available to attend in the latter part of training (during the final two years of training) at no cost to the Resident Doctors.
- Please send expressions of interest to **england.facultydevelopment.sw@nhs.net**.

External Educational Supervision Courses

- External Educational Supervision courses (specialty-specific) will be supported up to a maximum of £300.
- These courses are available to attend within the final two years of training.

Funding

What is Early Reimbursement?

Early Reimbursement FAQ

Application Process

UK Course Application Process

Funding Arrangements

Funding for External Courses

Approvals Required

What is Early Reimbursement?

Overview

- From February 2026, Resident Doctor's will be able to access early reimbursement for all course related costs.
- As a result, Resident Doctor's will be able to claim the course/conference cost, accommodation, and travel, provided that they have followed the processes within this guidance and have provided receipts.
- Travel via car or subsistence claims will still need to be submitted separately after the course/conference with receipts.
- There is a high expectation of financial probity within the GMC Good Medical Practice which includes "act with honesty and integrity" within the standards for all doctors.

Early Reimbursement FAQ

Question	Answer
Do I need to provide a certificate of attendance?	You are not required to provide a certificate of attendance moving forward.
Payment system (e.g EASY) will not let me enter a future date?	You and your Trust/Employer are permitted to input expenditure dates instead of activity dates as required.
I'm moving Trusts, who should pay my Study Leave?	Your current Trust should reimburse you. Any reimbursement after the course should be submitted to your new Trust.
I was unable to attend my course, what should I do?	Find out if the course can be rescheduled. If this is not possible, inform Trust Study Leave dept that paid the early reimbursement as soon as possible - no later than 1 month from the planned course date.
How do I reimburse my Trust if I did not attend a course?	You should follow your Trust process and arrange payment in line with their Standard Financial Instructions (PAYE/invoice).
What will happen if I do not inform my Trust of non-attendance/cancellation?	Financial probity is a high expectation of the GMC Good Medical Practice and failing to declare this could lead to a referral to your Head of School and Responsible Officer.
The course is over £1000 or over overseas, what should I do?	Your request will require additional NHSE-SW Study Leave Office approval - your HoS, TPD or ES are unable to do this.

Application Process

Overview

- The application process for study leave is led by the Employing Trust of the Resident Doctor.
- As described in the Roles and Responsibilities section, it is the requirement of the Resident Doctor to follow these processes.
- This section describes an overview of the application process for the Trusts that fall within NHSE SW's remit.

Application Process

- As described in the Overview of Guidance section, all applications must be prospective. For clarity, prospective applications must be submitted prior to the course taking place.
- Where possible, applications should also be approved prior to the course taking place, as there may be times when applications are not approved and the Resident Doctor must bear the cost of the activity.
- There are two main application processes within the South West.
    - Paper Forms
    - Accent
- If unsure of the application process for your Trust, please email them.

Trust	Email
Avon and Wiltshire Partnership	awp.medicaleducation@nhs.net
Cornwall Partnership	cft.medicalstaffing@nhs.net
Devon Partnership	dpt.medicaleducation@nhs.net
Gloucester Health and Care	mededadmin@ghc.nhs.uk
Gloucester Hospital	ghn-tr.study.leave@nhs.net
Great Western Hospital	gwh.jrd.study.leave@nhs.net
Livewell Southwest	livewell.medical-staffing@nhs.net
North Bristol	studyleavequeries@nbt.nhs.uk
Royal Cornwall	Rcht.residentdoctorstudyleave@nhs.net
Royal Devon University Hospital - East	rduh.residentdoctorsstudyleave@nhs.net
Royal Devon University Hospital - North	
Royal United Hospital Bath	ruh-tr.RUHstudyleave@nhs.net
Somerset	juniordoctorstudyleave@somersetft.nhs.uk
Torbay and South Devon	tsdft.postgradmedicaleducation@nhs.net
University Hospital Bristol and Weston	studyleavefordit@uhbw.nhs.uk
University Hospital Plymouth	plh-tr.uhpstudyleave-residentdoctors@nhs.net

Funding Arrangements

Overview

- The study leave budget has been held centrally with NHSE SW since 1 April 2018
- There is a finite budget for each region to support the fundamental principle of study leave. The main use of the study leave budget is for educational purposes to gain the competences defined in each curriculum

Examples of funding arrangements through the central budget include:

- Regional study days
- Other regionally commissioned internal courses which meet curriculum requirements, such as the Professional and Generic Skills courses (travel costs only and in some instances overnight accommodation)
- Courses which are explicitly required by the relevant curriculum and on the course list
- Courses which are a cost-effective way of delivering parts of the relevant curriculum
- Life support courses (e.g. ALS, ATLS, APLS) when these are curriculum requirements
- Other training, which is not required by the curriculum, but has been agreed in the Resident Doctors PDP and is on the course list (Resident Doctors may be required to contribute towards these courses)
- Other individual training needs which support career progression and have been agreed in the Resident Doctors PDP and are on the course list (Resident Doctors may be required to contribute towards these courses)

Funding for these courses will be funded by the employing Trust:

- Any mandatory/statutory training courses
- Refresher life support courses that are employment requirements and not curriculum requirements

Funding for External Courses

Overview

- In order to expedite the approval process, courses on the course list have been chosen by the TPD's and HoS's as subject matter experts
- Courses have been allocated into one of two categories for the eligibility of the amount of funding that can be approved following the Trust's application process.

Essential or Directly Supporting Curricular Outcomes Courses	Requirement
Overview	Essential courses are defined as those required to achieve or directly support curricular outcomes where the resident doctor is unable to acquire the necessary competences through their training programme or through local or regional teaching.
Funding Approval Amount	100% of course costs
Discretionary Courses	**Discretionary - Career Progression**
Overview	Discretionary courses are those that are not required to meet curriculum outcomes but offer demonstrable benefit through enhanced medical knowledge, professional development, or contribution to patient care. A supporting email from the HoS or TPD must accompany the application and explicitly address the criteria below.
Decision-Making Criteria for Discretionary Study Leave	Discretionary study leave requests must be considered on their individual merits. Approvers (HoS or TPD) should be assured that: • The Resident Doctor is achieving curriculum competences at or above the expected rate • The activity is clearly aligned with career intentions and progression • The educational benefit justifies the cost and represents value for money • Regional or more cost-effective alternatives have been considered • The course supports career progression and is appropriate to the stage of training • The activity is documented within the resident doctor's PDP Discretionary courses will normally be supported only at later stages of training and where core curriculum competencies have already been achieved.
Funding Approval Amount	50% of course costs will be reimbursed. Resident Doctors will be asked to contribute 50% of the course cost.

Courses not on the course list	
Overview	Courses not on the course list may be funded as discretionary courses provided they are held within the UK and are supported by the Resident Doctors TPD or HoS. A supporting email from the HoS or TPD must accompany the application and explicitly address the criteria below.
Decision-Making Criteria for courses not on the course list	• Courses in the UK under £1000 may be approved by the employing Trust following the Discretionary criteria outlined above and subject to TPD approval. • Courses in the UK over £1000 may be approved by the employing Trust subject to an endorsement by the TPD/HoS and subject to approval from NHSE SW Study Leave Team. Request for such approvals will be sent by the employing Trust. • For courses outside of the UK, please see the overseas guidance page
Funding Approval Amount	50% of UK course costs will be reimbursed. Resident Doctors will be asked to contribute 50% of the course cost. For overseas funding, please see the overseas guidance page

Key information

- Courses not on the course list at the start of the academic year will not be fully funded.
- Any course over £1000 on the course list requires NHSE SW study leave team approval. The request should be sent by the employing Trust ONLY. HoS/TPD's are unable to grant approval for these courses.
- All activity will need to be allocated to study leave time. The Trust will be unable to reimburse the Resident Doctor for any study leave time that is not allocated to the activity.
- The employing Trust and NHSE SW are unable to support retrospective claims under any circumstances.
- Submission and/or TPD approval does not automatically ensure reimbursement.

There are some courses whereby categories do not apply and have separate funding arrangements as detailed in the study leave guidance.

These courses are listed below with more detail found on the Course Information and Overseas pages:

- Leadership and Management Courses (including Professional and Generic skills)
- Revision Courses
- Train the Trainer, teaching, and educational supervisor courses
- Life support Courses
- Overseas Courses

Approvals Required

Under £1000

Category	Educational Supervisor	Training Programme Director	Head of School	Rota Co-ordinator	Trust PGME Team	NHSE SW SL Team
Essential	Required			Required	Required	
Discretionary	Required	Required		Required	Required	

Over £1000

Category	Educational Supervisor	Training Programme Director	Head of School	Rota Co-ordinator	Trust PGME Team	NHSE SW SL Team
Essential	Required			Required	Required	Required
Discretionary	Required	Required*	Required*	Required	Required	Required

*TPD or HoS endorsement is required for Discretionary courses over £1000

Over 4 days duration

Category	Educational Supervisor	Training Programme Director	Head of School	Rota Co-ordinator	Trust PGME Team	NHSE SW SL Team
Essential	Required		Required	Required	Required	
Discretionary	Required		Required	Required	Required	

Expenses

Overview of Expenses

Reminder of Expectations

Accommodation

Subsistence

Travel

Excluded Expenses

Overview of Expenses

Subject:	Allowance:
Mileage – Work Base to Educational Venue	£0.30 per mile, in accordance with National Policy.
Public Transport	This must be equivalent to standard class. Where cheaper options are available, this must be documented and agreed.
Overnight Accommodation - (Commercial e.g. Hotel or B&B - including breakfast)	Outside London - Up to a maximum of £120 per night. Within London - Up to a maximum of £150 per night. Overseas - Up to a maximum of £150 per night.
Overnight Accommodation - (Staying with family/friends)	Up to a maximum of £20 per night.
Meals - per 24-hour period	Up to a maximum of £20.00 only in line with the funding limits for lunch and dinner as noted in the below sections.
Exams	Costs for travel, accommodation & subsistence only.
Regional Training	Costs for UK travel only. Accommodation & subsistence can be reimbursed if the conditions within the below guidance is met.
Revision Courses/Question Banks	See full guidance for when you are eligible to claim.
Overseas	For the purposes of overseas expenses, the overseas section of the guidance must be consulted.

Reminder of Expectations

- As noted within the expectations on the Overview section, Resident Doctors should not commit to the costs of any course activity or event until full approval has been received through the approved application process as determined by the trust and this guidance. Any costs incurred without prior approval will be borne by the Resident Doctor.
- As noted within reimbursements on the Overview section, Reimbursement submissions must be submitted NO LATER than 3 months, with the expected timeframe being 6-8 weeks after the event. This is in line with NHS Financial Regulations and NHS Terms and Conditions. Any claim after this deadline will not be approved.

Accommodation

Conditions when Residents Doctors will be reimbursed for accommodation

- Where it is not reasonable to travel on the day of the event
- the distance to the event is greater than 100 miles and round trip from their place of work.
- Early start or late finish

Duration of the accommodation period

- Will be limited to the duration of the event
- One night either before or on the night of the last day of the event where travel to the venue is in excess of the 100 mile round trip. **Example:** the course runs from February 01 to 04 February can either claim for 31 January to 03 February OR 01 February to the 04 February.

Accommodation reimbursement limits per night

- Outside of London - Room including breakfast - £120
- Within London - Room including breakfast - £150
- Staying with friends and family - £20

Subsistence

Expectation

- Breakfast to be included within the accommodation costs.
- Lunch may be reimbursed when five hours away from base during the lunchtime period between 12:00 to 14:00.
- Dinner may be reimbursed when ten hours away from base and returning after 19:00.
- One receipt supports one meal. Please do not submit multiple receipts to the Trust office.
- Reimbursement for alcoholic beverages will not be reimbursed under any circumstances.

Meal Allowances

- For each 24-hour period, the maximum amount equals £20
    - Lunch equals £5
    - Dinner equals £15

Travel

Travel within the UK

- Resident Doctors will be reimbursed at the most economical rate of travel. NHSE SW reserve the right to reimburse travel at the most cost-effective rate if submissions are excessive.
- Early booking for travel and accommodation should be undertaken wherever possible to minimise the cost associated with attending an event.
- Travel to the airport in the UK will be reimbursed at the most economical rate, which may be the equivalent to standard rate train fares or coach.
- Flights within the UK may be considered if this is the most cost-effective option (This must be evidenced), however pre-approval must be received from the PGME team within the Trust. Flights/baggage cost will be reimbursed to a maximum equivalent of 2nd class train travel.
- Where personal vehicles are used, mileage be reimbursed at £0.30p per mile in accordance with National Policy i.e. calculated from work base to educational event and not from home to educational event.

Excluded Travel Expenses within the UK

- First Class or business class fares will not be supported.
- Car parking fees, including airport parking
- Taxi Fares (However in exceptional circumstances, may be approved where the health and safety of a Resident Doctor is compromised).
- Additional/larger cabin/hold baggage is non-reclaimable. Dean's discretion will be used in individual cases with supporting evidence.
- Electric Scooters.
- Bicycle Hire.
- Toll Bridges.
- Congestion charges.

Travel outside of the UK

- Resident Doctor will be ineligible for reimbursement for travel while aboard. This cost will be borne by the Resident Doctor. See overseas section for more details.

Excluded Expenses

When not using Study Leave Entitlement

- When the Resident Doctor does not use their study leave entitlement, they are ineligible to be reimbursed for any costs relating to that time period/event.

Above the specified rate

- Expenses exceeding the specified rates.

Employer/other related leave

- Other employer-related leave.
- Interview Leave of any type e.g. consultant posts.
- Statutory and mandatory training required by employers.
- Travel, accommodation and subsistence relating to employer related requirement.

Retrospective/Unapproved fees

- Retrospective applications - i.e. applications submitted after the course start date (irrespective of circumstances).
- Fees for courses that are booked and not attended.
- Fees for courses not approved.

Course related fees

- In line with Postgraduate and Higher Courses section: Postgraduate Certificates, Diplomas, Masters and PHD courses
- Enrolment on to a training programme and payment for portfolio access.
- Courses set up or attended in preparation for a consultant post.
- Courses not on the course list, except for discretionary courses - subject to specific criteria.

Exams and Revision

- Exam fees are not funded.
- Professional examination fees at any point of training e.g. FRCP exams.
- Courses for specialty examinations during the Foundation Programme.
- More than 1 revision course per exam if not provided by the school and if there is a clearly defined exceptional need, such as a recommendation from the Professional Support and Wellbeing team at the Deanery, (PSW SW) or the ARCP Panel/HoS has recommended a Resident Doctor to attend. Please see Exam Preparations / Revision courses (including Question Banks).

Subscription and Memberships

- Royal college membership fees/ E-portfolio fees.
- Subscription fees.
- Open access journal publications.
- ARCP attendance and associated expenses.

Other Events

- Conventions or Ceremonies
- ARCP attendance and associated expenses.

Overseas

- Currency conversion charges
- Visas or application fees.

Other Expenses

- Printing costs, such as posters for conferences.
- Course materials and books.
- Credit card charges

Regional Teaching

Annual Development Plans (ADP) including Approval Process

ADP Submission Checklist

Regional Teaching Reimbursement Key Factors

Funding Requests including Approval Process

Funding Arrangements

Face to Face Teaching

Resident Doctor Organised Training

Annual Development Plan

Overview

- The ADP for each school provides an overview of any planned regional teaching. Each approved event is given a related reference number which is used by the Trusts to process any financial outlays.
- Any courses not on the ADP will need approval through the Request Form process. It will require NHSE SW to agree funding before it can be organised and delivered.
- Applications for Resident Doctor's study leave remain with the Trusts. The reference number should be used when/ if Resident Doctors claim any related expenses (i.e. travel) for attending these courses.

ADP Reference List

Annual Development Plan April 2026 to March 2027

Funding Requests

Overview

- The ADP for each school provides an overview of any planned regional teaching and each event is given a related reference number.
- A Funding Request Form will be required for any courses not on the ADP. It will require NHSE SW to agree funding before it can be organised and delivered.
- Applications for Resident Doctor's study leave remain with the Trusts. The reference number should be used when/ if Resident Doctors claim any related expenses (i.e. travel) for attending these courses.

Funding Request Form

NHSE SW Study Leave Funding Request Form for Regional Teaching

Funding Arrangements for Regional Teaching and Funding Requests

Catering

- Catering can be split into three main sections:
  - Morning and Afternoon Refreshments = £3 per period
  - Lunch = £7 per person
- Half Day Event– You may claim up to one set of refreshments
- Full Day Event - A total of £13 may be utilised for a full day event

External Facilitator Cost

- External facilitators as those who are not employed within the PGME South West NHS regional footprint.
- Facilitators within the PGME South West NHS regional footprint should utilise the education and training tariff funding provided to the Trusts.
- External Facilitators are to be used only when a facilitator within the PGME South West NHS regional footprint cannot be sourced.

Room Hire

- NHS facilities should be considered first and foremost
- Where no NHS facility is available, an appropriate venue for an educational event should be sought.
- Trusts can only use certain venues. You will need to liaise with the Trust MEM to find a suitable venue.

Training Materials

- This is not an exhaustive list and other items can be considered
  - Consumables
  - Cadavers

Unable to fund:

- Books for Resident Doctors
- Gifts/Presents

Face to Face Teaching

Overview

- In principle faculty should take a blended approach to regional/out of base teaching unless it is a practical event.

Considerations before Organising Face to Face Training

- Resident Doctors should be given the option to attend virtually if there is no practical element to the course and/or there is no need for them to attend face-to-face.

Organising Face to Face Training

- The decision to run a course face-to-face is devolved to the programme leads. These events should happen as much as possible in a Trust or other NHS premises and appropriate health and safety measures according to the Trust/Organisation policy should be in place.
- If a face-to-face event is planned, it is off NHS premises and NHSE SW are funding the event, it should have been noted and agreed on the Annual Development Plan (ADP). A reference number will have been assigned for that event and needs to be included on any application made by the Resident Doctor - Please liaise with your local MEM for assistance with this.
- If you wish to run any courses on NHSE SW premises, please liaise with your Education Programme Manager as these will need to be booked with sufficient notice.

Resident Doctor Organised Training

- If a Resident Doctor wishes to run a face-to-face teaching event which is unplanned and not on the ADP, please ensure the HoS/TPD or ES supports this request and any appropriate health and safety measures have been taken.
- If funding is required a Funding Request Form will need to be completed and submitted to the study leave inbox prior to running the event.
- It is the responsibility of the faculty member approving the course delivery to ensure the details for running an event are applied and sent to NHSE SW as appropriate as described above.
- If required all necessary paperwork should be completed to demonstrate health and safety requirements have been adhered to, any funding has been agreed and an appropriate reference number has been provided to the organisers.
- Please ensure the reference number is included on any claim made by the Resident Doctor and details of the course are discussed with the Trust Medical Education Manager for them to be able to reimburse individuals and claim back funds from NHSE SW.

Overseas Guidance

Quick Reference Guide and Ireland

Principles of Overseas Study Leave

Overseas Application and Approval Process including Form

Outline of Application and Approval Process

Resident Doctor's Responsibilities

Head of School Approval

Quick Reference Guide

The overseas study leave section must be reviewed for the full details, this guide should be used for quick referencing.

Overview	Description
Application for Time	Submitted through the employing Trust in accordance with their local Trust policy.
Annual Leave	Reimbursement for time to an event cannot be claimed if using annual leave.
Conferences	When the applicant is the first author and sole presenter of a paper which has been accepted for a poster or presentation.
Course/Activities	Overseas study leave will only be considered if no equivalent course or activity is being held in the UK.
Attendance	Events where attendance will require longer than 4 days will need to be agreed by the HoS, based on event involvement.
Funding	Limited to one overseas for any one programme or every three years. NHSE SW will consider funding either the cost of the conference/course or the Accommodation and Travel. Subsistence and travel whilst abroad are not supported.
Funding Applications	Submitted to the **NHSE SW Study Leave inbox** with full details, a minimum of 8 weeks prior to the event.
Approved Applications	The allocated reference number will be required by your Trust. They will be unable to reimburse a claim without this number.
Expenses	Any costs incurred by the Resident Doctor without having prior approval will be borne by the Resident Doctor.
Retrospective Applications	NHSE SW are unable to support retrospective claims under any circumstances.

Ireland

Travel to Ireland:	Clarification:
Locations in Northern Ireland e.g. Belfast	Classed as part of the UK for travel.
Locations in the Republic of Ireland e.g Dublin	Classed as Overseas for travel.

- It has been nationally agreed that joint UK and Irish Society meetings will not be counted as an overseas conference when they are held in Dublin, Ireland.

Principles of Overseas Study Leave

Overview

- 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) or the Resident Doctor is presenting their own work (for example as a poster).
- Notwithstanding the aforementioned approval would be required by the Postgraduate Dean or delegated approver at the Postgraduate Medical Education Team.
- **If a Resident Doctor meets the application criteria and their application receives approval, NHSE SW will consider funding the lower amount of either the cost of the conference/course at the early bird rate or the accommodation and travel.**

Conditions for Overseas Courses and Conferences

- The principles, application process and funding allowance within the guidance takes precedence over any categorisation of any named course on the course list.
- **One overseas conference/meeting, providing all other curriculum requirements are met, will be considered for each Resident Doctor for any one programme, which can be defined as Foundation, Core, Higher or otherwise every three years (so as not to disadvantage doctors on a run-through programme).**
- Overseas Study Leave should align to the Resident Doctors curriculum or PDP.
- If service requirements prevent attendance at a UK based educational opportunity, an international alternative/equivalent could be considered.

Funding for Overseas Courses

- Funding for overseas study leave will only be considered if there is a documented discussion with the ES about the clear need of the course/conference to meet curriculum requirements, the course/conference provides a clearly stated curriculum outcome and one of the following criteria is met:
    - For conferences, when the applicant is the first author and sole presenter of a paper which has been accepted for a poster or presentation. This poster or presentation must be based on the Resident Doctors own research undertaken as part of a clinical training programme.
    - For other courses or activities when there is no equivalent course or activity in the UK. For example: an international conference for a very small specialty which does not have a conference.
    - When the funding required is less than that of attending the cheapest equivalent activity in the UK it is the Resident Doctors responsibility to provide evidence of this when applying for funding.

Overseas Specific Funding

- Course fees:
- Where there are different ranges of fees for the event and approval is given to attend, Resident Doctors will only be reimbursed for the early bird fees.
- Where the conference fee has been waivered for any reason, NHSE will still fund the lower amount of either the cost of the conference/course at the early bird rate or the accommodation and travel.
- Membership fees which are included in the event fees will not be reimbursed.

Accommodation:

- Requests for reimbursement of overnight accommodation costs will only be granted where it is not reasonable to travel on the day of the event or end of the event.
- Overnight accommodation is in alignment with the UK agreed rate within London (£150 per night).
- Subsistence expenses will not be reimbursed by NHSE SW.

Travel within the UK:

- Travel to the airport in the UK will be reimbursed at the most economical rate, which may be the equivalent to standard rate train fares or coach.

External Funding

- If an external body such as a Medical Royal College suggests a Resident Doctor attends an international conference, NHSE SW will expect that body to contribute at least 50% of the costs.

Funding Exclusions

- Resident Doctors cannot claim for any reimbursement to an overseas event if they are using annual leave.
- Any costs incurred by the Resident Doctor without having prior approval will be borne by the Resident Doctor.
- Subsistence and travel whilst abroad must be met by the Resident Doctor.
- Travel within the UK:
    - Airport car parking
    - taxi fares
- Overseas revision courses will not be approved.

Non-NHS Funded Overseas Study Leave

- If an individual wishes to fund a period of International Study Leave by other means, the ES/equivalent should still ensure the activity aligns to the curriculum or PDP.
- In this instance, the Resident Doctor should ensure that they follow their Trust's Study Leave application process.

Overseas Courses that include Leisure Activities

- Courses that include leisure activities will be scrutinised. Only the educational component may be supported.

Remote Attendance to an Overseas Course/Conference

- 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 Resident Doctor and their ES/equivalent and will be categorised as appropriate for the speciality course list.
- The TPD/equivalent should also be consulted to confirm the impact factor/quality of the specific international conference/meeting proposed.

Application Process

- The application for overseas study leave is split into two separate applications:
    - Time - Must be submitted in accordance with the employing NHS Trusts policy and procedures.
    - Funding - Must be submitted in accordance with the process outlined within this guidance.

Overseas Study Leave Application Form

- The Overseas application form should be completed in accordance with the guidance below.
- **Download Overseas Application Form here**

Outline of Application and Approval Process

Resident Doctor's Initial Actions:

- Application for funding should be submitted to the NHSE SW Study Leave inbox/or via Accent (if used) with the costs for conference fee, accommodation and travel should also be included.
- If emailing the email subject heading should read “Overseas REQUEST for Study Leave” and sent at least a minimum of 8 weeks prior to the event.
- Application for time will also need to be submitted through your employing Trust.

NHSE Study Leave Team Actions:

- Upon receipt the application is logged and discussed at the next Study Leave Weekly Approval Panel.
- Where a decision will take longer than 10 working days, the Resident Doctors will receive an email acknowledging receipt.
- The Study Leave Approval Panel aim to return a decision within 10 working days from the date of submission.
- If approved a copy of the outcome and reference number will be sent to the Resident Doctor and the employing Trust in order to facilitate a smooth process for reimbursement.
- **If a Resident Doctor meets the application criteria and their application receives approval, NHSE SW will consider funding the lower amount of either the cost of the conference/course at the early bird rate or the accommodation and travel.**

Reimbursement after the activity

- Resident Doctors will need to ensure that they provide the reference number for the application to the Trust along with any other documentation required by their Trust when submitting a claim.
- The Trust will include this on the Monthly Study Leave Return.
- Trusts are unable to reimburse a Resident Doctor without the allocated reference number.
- Resident Doctors should not send any claims for reimbursement to NHSE SW as they are unable to process these.

Returned Application Forms

- Applications will be returned if there are any details missing or if there is insufficient information. This may delay a Resident Doctors application and fail to meet the required timescale.

Retrospective Applications

- It is the responsibility of the employing Trust to manage any requests for retrospective claims.
- NHSE SW are unable to support retrospective claims under any circumstances.

Resident Doctor's Responsibilities

- Resident Doctors should not commit to the costs of international events until approval has been received. Study leave applications for overseas activity must be approved by NHSE SW Study Leave Team / SW Postgraduate Dean or the nominated deputy BEFORE applying for reimbursement.

- It is the Resident Doctors responsibility to ensure the application is submitted to the correct email addresses and in time for it to be processed by both the employing Trust and NHSE SW.

- It is important to ensure that Resident Doctors provide all the information required in order for NHSE SW to make an informed decision.

- Resident Doctors will be expected to provide a clear and descriptive supporting statement explaining why competencies gained from an activity cannot be achieved from local and/or regional programmes, what will be their personal gain, as well as how it will enhance the needs of the wider NHS agenda.

- The Resident Doctor must ensure that the application has been signed by the ES/TPD or HoS, whichever is appropriate to the needs of the request. Confirmation from the sponsor's email will be accepted if a signature is difficult to obtain stating they support the application under the terms of the overseas guidance requirements.

Head of School Approval

- Events where Resident Doctors require longer than 4 days attendance will need to be agreed by the HoS. In some cases, funding may only be reimbursed according to the involvement of the postgraduate doctor at the conference.

Appeals

Conditions on when to submit an appeal

Appeals Flowchart

Appeals Process

Decision Outcome Emails

When to Submit an Appeal

- An appeal should only be submitted if a Resident Doctor believes the study leave process has not been followed fairly and consistently. The appeal must fits into one of three categories:
    - The process that led to the decision was not followed correctly by the Trust/NHSE
    - There appeared to be bias, resulting in perceived unfair treatment
    - New information has been made available that was not known at the time of the original decision and may have influenced the outcome
- An appeal should not be submitted if the Resident Doctor considers the outcome unfair, although this may be affected if the process is deemed to be incorrect.
- If a Resident Doctor has reason to believe that their study leave application was processed unfairly or incorrectly, they are able to request a review of the process by making a written submission to NHSE SW via the process below.

Appeal Process

- Resident Doctors should submit their appeals to **england.studyleave.sw@nhs.net** with the subject heading 'Study Leave Appeal'.
- Resident Doctors need to ensure they have completed the following actions before/when submitting an appeal:
    - Try to resolve the matter at a local level
    - Read through and understood the Trust Application Process
    - Read through and understood the NHSE South West Study Leave guidance
    - Understand an appeal can only be submitted within 4 weeks of the original decision
- The appeal should include the reason/s for the appeal of the process and any evidence to support this.
- The appeal will initially be reviewed in a Study Leave Initial Appeal Review meeting consisting of the following members:
    - Postgraduate Associate Dean for Study Leave
    - Clinical Education Manager
    - Study Leave Team Manager
    - Study Leave Officer
- After the meeting, the Resident Doctor will receive an email confirming if the initial decision is upheld.
- If the initial decision is upheld, as part of the process, the Resident Doctor will be given the opportunity for their case to be reviewed by the Senior Team Appeals Panel which will convene monthly. The panel consists of the following members:
    - Postgraduate Associate Dean for Study Leave
    - Senior Member of the NHS England Team
    - Head of School
    - Resident Doctor
    - Study Leave Officer (who will provide admin support)
- Once reviewed, the Resident Doctor will receive an email informing them of the outcome.
- The Resident Doctor will receive a final response within 30 days from the original appeal submission
- The Decision by the Senior Team Appeals Panel is final.