

Policies, Procedures, Guidelines and Protocols

Document Details		
Title	Study and Professional Leave – Medical and Dental	
Trust Ref No	2534	
Local Ref (optional)		
Main points the document covers	This policy details the overarching approach and context for supporting medical and dental staff with study.	
Who is the document aimed at?	This policy is aimed at Medical and Dental Staff, Clinical Leads and line managers.	
Owner	Resourcing	
Approval process		
Who has been consulted in the development of this policy?	Managers (senior and line managers), Medical and Dental staff, JLNC	
Approved by (Committee/Director)	People Committee	
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Full Equality Impact Assessment	No	
Lead Director	Chief People Officer	
Category	People, Resourcing and Workforce	
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Who the policy will be distributed to?	To senior staff for cascading	
Method	Dissemination via Datix alerts to managers and available to all staff via the Trust website on Staff Zone	
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Document Links		
Required by CQC	No	
Other	None	
Amendments History		
No	Date	Amendment
1	May 2025	<ul style="list-style-type: none"> • New Policy

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1. Policy Statement

- 1.1 Shropshire Community Health NHS Trust believes in supporting the continued education and training of its professional medical staff and values education as an integral part of delivering excellent care. Continued professional development is also an integral part of the appraisal and revalidation process.
- 1.2 Provision for study/professional leave for medical and dental staff (from here forward referred to as the individual) is usually required to comply with training and Continuing Professional Development (CPD) requirements, to maintain Royal College education standards, to fulfil appraisal and revalidation requirements, and for other Clinical Governance requirements. The Trust, with its commitment to supporting its workforce, will view requests for study leave positively, but with a view to ensuring the needs of service delivery can be safely met.

2. Aims and Objectives

- 2.1 The purpose of this document is to:
- Provide clear guidance for Consultant/SAS Doctors, Dentists and locally employed doctors employed by Shropshire Community Health Trust in relation to the entitlements to, and procedure for booking, study and professional leave.
 - This policy applies to Consultant/SAS Doctors, Dentists and locally employed doctors employed by the Trust. Employment includes full time and those working less than full time.
 - Ensure that there is a consistent and timely approach to the request for and management of this type of leave.
 - To ensure that there is a minimum disruption to the provision of services as a result of study leave being approved.
- 2.2 The policy will ensure that the Trust's patients and their needs are at the forefront of decision making about doctors absence from work.
- 2.3 The policy will ensure that Consultants/SAS Doctors, Dentists and locally employed doctors are enabled to maintain their personal competence and meet the requirements of medical revalidation.
- 2.4 This document must be read in conjunction with the appropriate national terms and conditions and the appropriate Trust employment policies – these are referenced on page 9 of this document.
- 2.5 Leave that is approved with pay is conditional in that the Clinician will not undertake any other paid work during the leave period without the permission from the Medical Director/Operational Manager.

3. Scope

- 3.1 This policy applies to all Consultants/SAS doctors, Dentists and locally employed doctors employed by Shropshire Community Health NHS Trust and includes both part time and fixed term contracts.
- 3.2 This policy excludes Postgraduate Doctors in Training, Locum and Agency Doctors.
- 3.3 Postgraduate Doctors in Training: The study leave process for Postgraduate Doctors in Training is out of scope of this policy. Current guidelines and processes can be located from:- [Study Leave \(westmidlandsdeanery.nhs.uk\)](http://westmidlandsdeanery.nhs.uk)

4. Definitions

4.1 Study leave includes:

- Study (usually, but not exclusively or necessarily on a course or programme)
- Research
- Teaching and training
- Examining or taking examinations
- Visiting clinics
- Attending professional conferences or other educational sessions

4.2 Professional leave is that which relates to a range of approved educational activities which would not necessarily attract CPD points. Professional leave with pay and expenses:

- Duties as an officer, committee member or member of a working party of a Royal College, Faculty, Professional or Scientific Society or NICE.
- Examining for Royal College, University or other body
- Attendance as a College Assessor at an Advisory Appointments Committee inside/outside Region.
- Attendance at officially constituted bodies giving advice to the Department of Health.
- Duties as a member of a Mental Health Act Commission.
- Duties as a member of a Medical Defence Society.
- Attendance at British or International Standards Committees.
- Duties as a member of the Medical Research Council.
- Membership of Editorial Board of a Scientific Journal.
- Clinical Trials Working Party (should be taken as annual leave if remunerated by external body)
- Attendance at external appeals committee
- Lecturing outside the Region

- Course instructor
- One off delivery of undergraduate or postgraduate lectures within the Region
- Visits to hospitals outside the Region for the purpose of assessing training facilities
 - In connection with responsibilities as Regional Educational Adviser.
 - Attendance at External Appointments Committees for Medical Staff outside the Trust
 - Attendance at external appeals committees.
 - One off delivery of undergraduate or postgraduate lectures within the Region

4.3 The following activities are regarded as official duties that are undertaken on behalf of the Trust and therefore study leave or professional leave would not be required:

- Consultant to Consultant meetings related to patient care
- Meetings with local commissioners
- Local Service, delivery and improvement meetings
- Specialist Network meetings e.g. Cancer, Cardiology
- In house mandatory training
- Attendance at a Coroner's inquest or court if required by the Trust
- Meetings in connection with the management of patients
- Attendance at interviews for Doctors in Training

4.4 The total leave allowance for Consultants and SAS Drs is 30 days over 3 years, typically 10 days per year includes both study and professional leave. For Dentists this is 21 days over 3 years. Medical staff that commence during the financial year will receive a pro-rata number of days. Study leave is with pay and expenses or time off in lieu (where study leave is taken on a nonworking day) with expenses. The Trust policy on expenses and the relevant terms and conditions of employment apply, see pages 8-9 of this policy.

4.5 The study leave year will run in accordance with the financial year (1 April – 31 March) Individuals are expected to manage their days in such a way as to support their CPD over the 3-year period. The first three year period would have commenced from the date of appointment in the grade. The 21/30 days leave allowance may not be taken all at once, except in exceptional circumstances and with prior agreement of the Clinical Director. Unused time allocation accrued over a 3-year period cannot be carried over.

4.6 Locally Employed Doctors:

4.6.1 Study Leave time and expenses for Locally Employed Doctors should be agreed by the Clinical Lead in conjunction with Operational Managers on a discretionary case by case basis. Any agreed expenses should be met by the relevant division.

4.10 Distribution of Study/Professional leave

4.10.1 Study leave/professional leave should be distributed across DCC and SPA time in a reasonably proportionate manner.

4.10.2 The leave period will be over 3 years with the intent for this to be evenly distributed. In the unusual circumstance of individuals wishing to take more than their annual proportion of their 21/30 days entitlement within a single year this will need to be discussed with the Medical Director and Operational Manager.

4.6 In determining the number of days to be deducted from an individual's study leave allocation, the Trust acknowledges that it is sometimes necessary to travel the day before to arrive in time for the start of an event. If travel time does not require the cancellation of timetabled job planned activity (DCC or SPA), no study time will be deducted for travel. If, however, for example, the travel is the previous afternoon when the medical staff has timetabled job planned SPA time, half a day will be deducted.

5. Responsibilities

5.1 Trust Board

- The Trust Board in overseeing this policy is fully supportive of the need to ensure that patient safety is paramount in the decision-making process when agreeing Study or Professional Leave.

5.2 Chief Executive

- Approves study/professional leave for the Medical Director. (The Medical Director approves study/professional leave for the Associate Medical Directors).

5.3 Medical Director

- The Medical Director is the lead Director ensuring that the Governance arrangements are in place to successfully implement Study/Professional Leave to monitor usage, cost and above all that quality is paramount. Specific responsibilities relating to the policy include:
 - ensuring that the appropriate consultation is undertaken on all new documents.
 - ensuring that systems are in place to review study/professional leave.
 - presenting any new or reviewed documents for ratification by the appropriate committee.

5.4 The Service Manager/Clinical Lead:

- Will ensure effective scheduling of activity. Study leave will normally be funded within the annual allowance, however there is no mechanism for carry over of funding from year to year.

- Approve up to 7/10 days professional/study leave per year for each individual within their speciality covered by this policy and will normally grant leave to the maximum extent consistent with maintaining essential services.
- Any agreed expenses are met by the relevant service area within their budgets.
- Annually review, professional development plans (PDP) with their Medical and Dental staff as part of the appraisal process/job planning process.
- Will only grant professional leave where the service impact can be managed effectively, and the Trust considers that the purpose of the leave is of importance to the Trust or the wider NHS.
- Where an individual is expected to attend a course during their day(s) off; managers should authorise time in lieu, this should be agreed in advance.
- Will ensure that where a practitioner is employed by the Trust and another employer that only the proportion of leave and funding for the Trust is authorised.
- When granting Professional leave, give priority to ensuring that colleagues are not prevented from taking annual leave or essential study leave.
- In exceptional circumstances, Professional leave may have to be withdrawn. Before Professional leave is cancelled, considerations should be given to:
 - The impact on service delivery for both attending and not attending
 - The financial implications; would the employee, Trust or wider health economy suffer a financial detriment by not proceeding with the professional leave?
 - Frequency of the event, recognising that some events are infrequent
- Authorise as soon as possible, any request for study/professional leave properly submitted and sent to the doctor for his or her own records a signed copy of the authorisation form.

5.5 Individual Doctors

- Consider how the learning will support the needs of patients and teams, the organisation and the wider community
- Agree with the Medical Director and Service Manager/Clinical Lead any requirement for regular professional leave and incorporate this agreement into their annual job plan.
- Give as much notice as possible; not less than 6 weeks for any leave to be agreed (not submitted) which impacts on direct clinical care unless there are exceptional circumstances.
- Apply to the Medical Director and Service Manager/Clinical Lead for the costs of professional/study leave to be met by completing and submitting the attached application form. (Appendix 1).
- Limit their application for the costs of professional/study leave to;

- Course Fees.
 - Travel expenses reimbursed at the level of standard return rail fare.
 - Mileage allowance for car drivers.
 - Travel expenses other than rail or car mileage where this is proven to be a cheaper alternative i.e. air travel (within the UK).
 - Travel costs to international meetings will only be met to the point of embarkation.
- In all cases applications for study leave outside the UK, (which, in accordance with national terms and conditions, may be granted at the discretion of the Trust) must include course / conference details, a full itinerary and a schedule of travel plans.
 - Ensure that expenses, travel, and accommodation are arranged as economically as possible and taking advantage of any discounts available for late/early/internet booking. Please refer to the Travel Expenses and Subsistence Claims Policy and Procedure.
 - Submit original receipts (these should be scanned and uploaded) with expense claim forms using e-expenses.
 - Ensure that the acceptance of sponsorship from commercial organisations complies with the Trust's Standing Financial Instructions and the Trust's Code of Business Conduct - Managing Conflicts of Interest Policy.
 - Make a declaration of interest for assistance from external agencies in line with Trust's Code of Business Conduct - Managing Conflicts of Interest Policy at the time of the request for Study Leave. This should be done via the Trust's datix system:
https://web.datix.thirdparty.nhs.uk/Shropshire/live/index.php?form_id=3&module=RAM
 - Record Study leave/professional leave in ESR for approval by their manager.

6. Links to Other Policies and Supporting Information

- Terms and Conditions of Service: Consultants (England) 2003
- Terms and Conditions Specialist Grade (England) 2021
- Specialty Doctor terms and conditions June 2021
- Associate Specialist (England) terms and conditions 2008
- Specialty Doctor (England) terms and conditions 2008
- Terms and Conditions of Service: Salaried Primary Dental Care Services June 2024
- Code of Business Conduct - Managing Conflicts of Interest Policy
- Travel Expenses and Subsistence Claims Policy and Procedure
- Continuing professional development: Guidance for all doctors - BMA
- CPD Guidance for Professionals: General Dental Council

Appendix 1 Application form for Study or Professional leave

Once authorised, wherever possible please book and pay for course fees/travel/accommodation using the Trust Credit Card. A Credit card authorisation form should be completed and signed by the authoriser and sent to Shropcom.payables@nhs.net Arrangements will then be made to complete payment/purchase rail tickets.

Please ensure that all sections of the form are clearly completed and signed before sending the form to Service Manager/Clinical Lead for final authorisation.

First name:		Surname:	
Grade:		Contact No: (mobile)	
Specialty:		Base:	
Email address:		Date of Request:	
Study leave taken in this year:		Balance remaining in the 3 year period (following this request):	
1. COURSE DETAILS			
Course Title:			
Organised by:			
Venue:			
Dates:		No. of Days required:	
CME/CPD points to be awarded:			
2. PLEASE TICK REASON FOR ATTENDING			
To attend a course		By special invitation	
To read a paper		To attend a scientific meeting	
To give a lecture		To sit as Member of Council for Royal College/National Committee/Specialist Advisory Committee	
To present a demonstration		Other reason (please specify)	
3. PARTICULARS OF JOURNEY			
Date of Departure		Date of Return	
Number of Days		Number of Miles (total)	
Mode of Transport			
4. ESTIMATED COST			
Travel * (Mileage at reserve rate per mile – see relevant Terms and Conditions of service) (Estimate Train Expenses)			£
<i>Please note that the cheapest form of travel should be used at all times. Where booking train travel this may be paid using the Trust Credit Card – please complete the required financial request form)</i>			p
Course Fee/Registration Fee			

<i>(Where approved course fees may be paid using the Trust Credit Card – please complete the required financial request form)</i>			
Subsistence: <i>(Where approved accommodation fees may be paid using the Trust Credit Card – please complete the required financial request form)</i> <i>Otherwise: please provide an estimate cost for any accommodation required to attend the study leave activity.</i>			
Other: <i>(Please Give Details)</i>			
5. FUNDING		£	p
Sources other than this Trust. <i>Please specify source or state NIL if not applicable:</i> If you are accepting Hospitality or Funding from any other source then you are requested to complete appendix D of the HR52 Trust Policy and submit this along with your form detailing all expenses to be claimed. If this is not attached then the Study Leave will be declined.			
Trust Funds <i>Approval must be obtained prior to submitting this application.</i> Please identify Fund: <i>(Study Leave Budget / SAS Funds / Other)</i>			
Contribution required from Trust:			
TOTAL (This sum should be the same sum as Section 4)			
Amount of funding approved			
MANAGEMENT AUTHORISATION <i>Please obtain relevant signatures or leave will be denied</i>			
Signature of Service manager		Date:	
Signature of Clinical Lead		Date:	
Estimated Cost		£	
APPLICANT AUTHORISATION			
Applicant Signature:		Date:	

To claim expenses:

Where possible you should book and pay for Course fees/travel/accommodation via the Trust Credit Card. If this has not been possible (e.g mileage, subsistence) please submit an e-expenses form for the remaining approved costs including the relevant receipts.