

SHORT COURSE/OTHER TRAINING STUDY LEAVE PROCEDURE

PROCEDURE REFERENCE NUMBER:	HRPG18a
VERSION NUMBER:	2
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CONSULTATION GROUPS:	JSC Workforce and Organisational Development Group Clinical Governance and Quality SMT
IMPLEMENTATION DATE:	April 2017
AMENDMENT DATE(S):	February 2020
LAST REVIEW DATE:	March 2020
NEXT REVIEW DATE:	March 2023
APPROVAL BY WORKFORCE TRANSFORMATION GROUP:	March 2020 (Chair's Action)
RATIFIED BY FINANCE & PERFORMANCE COMMITTEE:	March 2023
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SCOPE

Services	Applicable	Comments
Trustwide	✓	

**The Director responsible for monitoring and reviewing this procedure is
Executive Director of People and Culture**

**HRPG18a - TRAINING & STUDY LEAVE PROCEDURE – SHORT
COURSE/OTHER TRAINING STUDY LEAVE PROCEDURE**

ESSEX PARTNERSHIP UNIVERSITY NHS FOUNDATION TRUST

SHORT COURSE/OTHER TRAINING STUDY LEAVE PROCEDURE

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SAMPLE - DO NOT USE

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Assurance Statement

The purpose of this procedure is to ensure that a central record is kept of all study applications by the workforce development and learning department, whether costs are attached or not. This process will allow the Trust to have an overview of staff competencies and will allow access to training resources to be monitored in order to ensure equality of opportunity.

1.0 APPLICATION

- 1.1 Application Forms (see **Appendix 1 Non-medical staff and community service staff, Appendix 2 Medical Staff in mental health and learning disabilities**) for study leave must be fully completed by the employee and submitted for the relevant approval process to (Workforce Development, Medical Manager or Social Care Manager), with supporting evidence. The application should be submitted at least 6 weeks prior to the course start date to allow sufficient and reasonable time for the paperwork to be processed and should be as far in advance as possible (applicants should aim to take advantage of any early booking discounts). Retrospective funding of courses cannot be considered.. Appendix 1 is available as an electronic form on the Intranet. Applications should be by electronic form. No other form will be accepted
 - 1.1.1 The form must be completed as indicated for **short course/other development** Study Leave, and signed by the applicant's manager/Clinical Tutor in order to be considered for approval for funding.
- 1.2 The applicant must seek approval through their line management. Applications that are incomplete will not be considered and will be returned to the applicant.
- 1.3 A response will be sent to the employee (and a copy sent to their Line Manager) advising them of the outcome of the application. A copy of all applications and outcomes will be held centrally by the Workforce Development and Learning Department / Medical Workforce Training
- 1.4 If study leave has been granted, the staff member is responsible for booking himself or herself on to the course and for giving the Course Provider the invoice address as follows:

For non-medical staff and community service staff:
Workforce Development and Learning
[REDACTED]

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For Consultants, Associate Specialists and Staff Grades, address to the Medical Director

For all mental health and learning disability medical staff in training address to the appropriate medical tutor

Copies of all application forms should be sent to Workforce Development and Learning

1.4.1 Staff must not pay for courses and then request reimbursement. Instructions for payment will be included with the approval notification.

1.5 Applicants must ensure that they request permission at least 6 weeks prior to course start date to allow for the approval process required by external agencies providing courses. A summary of the approval process is included as Appendix 4.

1.6 Travel and subsistence are not paid out of the training budgets but from service budgets. Travelling allowances, when undertaking study will be paid as follows:

1.6.1 **By car:** Public transport rate is payable for all travel

1.6.2 **By Rail / Air:** All employees will be expected to use standard travel and to take advantage of cheap fares and off peak travel where possible. Air travel can be chosen provided the claimant can demonstrate it is the cheapest option.

1.7 All claims for subsistence will be paid in accordance with section 18 of the NHS Terms and Conditions of Service Handbook. Expenses for meals are allowable only when more has been spent than would normally be spent at work. Claims should be submitted within 3 months of the date claimed for

1.8 When the activity is completed, claims for course expenses should be requested using the appropriate process and be accompanied by all appropriate receipts or other proof of expenditure, within one calendar month.

2.0 GUIDELINES FOR APPLICATIONS FOR LOCAL AUTHORITY FUNDING

2.1 Complete a local authority training application form and obtain their manager's signature agreeing the appropriateness of the course

2.2 Send the completed form to their relevant local authority training department for confirmation of funding where necessary and agreement for release to undertake the course.

2.3 Send a copy of the application form to Workforce Development and Learning addressed as in 1.4, and the Social Care lead, for reference only.

2.4 Applicants must not assume they have gained a place on the course but must mark the dates in their diary.

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- 2.5 Once the course is agreed by their local authority training department they must advise their team manager.
- 2.6 The applicant will consult and recognise their employing authority's Study Leave and Workforce Development policies.
- 2.7 For training/courses relating to ASW/AMHP CPD the principles above will be followed with the exception that, once the application has been signed and agreed by the team manager, the application form will be sent to the relevant Assistant Director of Social Care for collation and distribution to the relevant local authority.

3.0 GUIDELINES FOR MANAGERS

- 3.1 Managers are expected to review each application critically and to decline or suggest amendments if they feel that the request is unreasonable or unlikely to be approved. This includes checking the application to ensure it meets the guidelines set out in the policy, and demonstrating that the application meets the requirements of the personal development plan of the applicant. Where an application is rejected by the manager a written statement should be provided explaining the decision. The Manager should keep a copy of all documentation, including the learning contract.

4.0 POST REVIEW OF DEVELOPMENT

- 4.1 After completion of any short course, other development or training, some form of post review of development should be completed. It will be at the manager's discretion to refuse any consideration of further study leave until they are satisfied that the development review has been undertaken and recorded appropriately. The review may take place during appraisal or at another appropriate time. A copy of any record, (see Appendix 1) should be kept on the participant's personal file and a copy sent to WDL. The form will be available electronically on the Intranet and a reminder of this requirement will be included in the approval notification.

END