**Study Leave for Educators: Operational Guide**

**MAKING A STUDY LEAVE APPLICATION AND CLAIM**

Educator approaches clinical director / head of service and / or rota master to request service approval for proposed study leave activity.

On receipt of service approval, educator applies for study leave by completing an educator application form which is available on the [NES website](https://www.scotlanddeanery.nhs.scot/trainer-information/study-leave/).

The form is submitted to [nes.emdoffice@nhs.scot](mailto:nes.emdoffice@nhs.scot). The Executive Medical Director / Senior Team will review the application. They can either support the application or not and communicate this decision to the study leave team. They may also specify a maximum funding amount they are prepared to provide for the requested activity.

[Senior Team will aim to review an application within two weeks of receipt]

The study leave team send an email to the educator with the decision and if appropriate, a link to the claim form is included in the approval email. A claim form and original or scanned receipts must be sent to the study leave mailbox within 3 months of the end date of the leave.

The study leave team will process the claim and arrange payment by cheque sent out to the educator. If receipts or a claim form are missing, educators will be emailed asking to submit before the claim is processed.

When making the application, as much detail as possible regarding the activity should be entered, all mandatory fields must be completed and, where applicable, realistic estimates of all cost elements should be entered to allow full consideration by the EMD/Senior Team.

Where an application is not supported any concerns or outstanding issues about the decision should be referred directly to the EMD/Senior Team.

NHS Education for Scotland is unable to make direct payments to course/conference organisers. Educators must pay the costs and claim back the approved expenses.

An educator can withdraw a study leave application at any point in the process, e.g. if course is cancelled or trainer is unable to attend (personal circumstances). If an application is being withdrawn after initial approval, please email [study.leave@nes.scot.nhs.uk](mailto:study.leave@nes.scot.nhs.uk) with the details.   
  
**FURTHER GUIDANCE ON EXPENSES CLAIMS**

Normally, expenses will not be reimbursed until after the event.

Certificates of attendance, invoices or fee notes are not accepted as a receipt. The amounts paid/received must be stated on the receipt for it to be valid. Where original receipts are scanned in order to submit electronic copies, both sides of the receipt must be copied, and the educator is required to retain the original receipt for a period of three years for audit purposes.

In cases where internet bookings have been made, ‘proof of purchase’ documentation will be accepted.

It is essential that the GMC number is fully completed on the claim form to ensure no delay in payment.  
  
**TRAVEL & ACCOMMODATION**

[This section represents an agreed policy as developed by the NES Partnership Forum with representation from various organisations.]

The cheapest forms of transport and accommodation should be used. Expenses shall be paid to meet actual disbursements and shall not be viewed as a source of remuneration.

No first-class travel will be reimbursed unless it can be proved to be cheaper than standard class travel. If not cheaper, the equivalent standard class fare will be reimbursed.

Accommodation should be booked which provides best value for money and wherever possible within the maximum limit of £100.00 per night OR £150 per night in London. For instances where accommodation will exceed the approved limits this should be referenced on the application and will be approved at the discretion of the Senior Team.

All claims for reimbursement must be accompanied by original or scanned copies of receipts. The following are not classed as receipts: boarding passes, invoices, certificates of attendance, statements of accounts, course flyers, and confirmations of course booking (if no fee is stated).

Mileage allowance: 27p per mile (public transport rate)

Additional passenger (attending same event): 5p per mile per passenger (this must be entered separately, and the name of the passenger clearly stated).

Costs for appropriate insurance cover for relevant approved leave will not be reimbursed.

**SUBSISTENCE**

Actual receipted costs can be claimed up to the following maximum limits:

* Absence of 5-10 hours (must include 12.00-14.00): £5.00
* Absence exceeding 10 hours (must end after 19.00): £15.00
* Full 24 hour period: £20.00

Course dinners will only be reimbursed up to maximum of £20.00

Alcoholic drinks and other non-food items included in receipts will not be reimbursed.

**CONTACT US**

[study.leave@nes.scot.nhs.uk](mailto:study.leave@nes.scot.nhs.uk)