Discretionary Funding for Higher Specialist Trainees

Guidance Document for Trainees, Training Body Personnel & Employers

September 2011
## Discretionary Funding for Higher Specialist Trainees

### Introduction
To complement the suite of educational and training supports implemented on foot of the introduction of the NCHD Contract 2010, the HSE created in 2011 a fund for higher specialist trainees i.e. specialist and senior registrars, who are enrolled in approved higher training programmes. This fund will be used to support higher specialist trainees to participate in education and training activities which are additional to those mandatory elements of training provided by the individual training bodies which are funded via the Agreements in place with the HSE.

Although the funding will be managed directly by the relevant Postgraduate Training Bodies (PGTB) the application for reimbursement will be administered centrally by the Forum of Irish Postgraduate Medical Training Bodies (Forum).

### Amount Available to Each Higher Specialist Trainee
The discretionary funding available to each specialist / senior registrar is equivalent to €500 per year of higher specialist training remaining as of 1st July 2010 e.g. a specialist trainee who commenced year 3 of a 5 year HST training programme on 1st July 2010 will have access to a cumulative €1,500 over the three remaining years of their programme (€500 per annum for years 3, 4 and 5). While each trainee can carry over €500 per year for the number of years that their specialist training period consists of they cannot claim such funding in advance.

### Who This Fund Is Available To
This fund is only available to those higher specialist trainees i.e. specialist registrars and senior registrars who:

- are actively participating in a higher specialist training programme and
- who hold the NCHD Contract 2010.

This discretionary funding is also being made available to GP trainees in their third and fourth years of training and those SpRs/SRs who are on the HSE-supported Dr. Richard Steevens’ Scholarship and HSE-HRB supported National SpR/SR Academic Fellowship Programme.

The fund will **not** be available to those higher specialist trainees i.e. who:

- do not hold NCHD Contract 2010 or
- are inactive on a programme or
- are engaged in overseas training (with the exception of those on
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the HSE-funded Dr. Richard Steevens’ Scholarship) or

- are in full time research or
- are in a clinical post for which they are not receiving training credit.

Should such individuals become eligible for funding at a certain time, they will not be eligible to claim for funding prior to the date they became eligible.

What This Discretionary Funding Can Be Used For

This discretionary fund can be used by Senior / Specialist Registrars and 3rd/4th year GP trainees to support their participation in relevant educational and training events that have been approved by the relevant postgraduate training body. This may include, where deemed appropriate by the postgraduate body, a proportion of the travel and subsistence costs associated with the educational and training event.¹

This fund can also be used to support the purchase by trainees of specialist medical equipment specifically required as part of their HST training programme for example magnifying glasses for use in microsurgery.

What This Discretionary Funding Cannot be Used For

This discretionary fund cannot be used:

- to further subsidise trainees in educational activities for which the HSE already has separate arrangements in place e.g. contribution toward defined examinations and clinical courses;
- to pay for or subsidise educational activities which are funded via the Agreements in place between the HSE and the individual training bodies;
- for the purchase of on-line resources, software, lap tops, palm pilots or any other hardware; and
- for programmes/training modules provided directly by local employers, for example Infection Control training courses.

How A Trainee Can Access This Fund

Trainees who are eligible to avail of this fund must submit the signed reimbursement form and return it with original receipts and a certificate of attendance (if applicable) to the Forum. All applications must be signed and approved by the current trainer or training director as set out by the PGTB.

Once the claim is received, the Forum will review the reimbursement form and issue to the applicant, as appropriate, formal acknowledgment of the application. On a quarterly basis the Forum will recommend to the PGTB

¹ Expense claims made for travel and subsistence will be considered in line with HSE Guidelines and if approved, will be reimbursed at public sector rates. Claims for mileage expenses will only be approved where no suitable public transport (e.g. train or bus) is available or where public transport is available only at equal or greater expense.
reimbursement to individual trainees enrolled with the PGTB. The PGTB will then review the claim and if approved issue payment directly to the trainee. The decision of the PGTB regarding the appropriateness of the application made is final.

Applications should only be submitted after an education event has taken place.

When A Trainee Can Apply

Trainees can apply for funding in respect of financial liabilities incurred from Monday, 11th July 2011 onwards. For those trainees who have not yet claimed in relation to expenses incurred as higher specialist trainees in the 2010 / 2011 training year, such applications must be received by the Forum no later than 31st October 2011. Applications received after this date in relation to 2010/2011 events will not be considered.

Trainees must complete the reimbursement form prior to the educational event and receive prior approval from the relevant trainer/training director. The application form should only be forwarded to the Forum with original receipts after the educational event has taken place. This allows the trainee to submit all relevant documentation (e.g. receipts, acknowledgement of payment) along with a required certificate of attendance or equivalent thereof. The Forum will maintain a record of the use of the discretionary funding for each trainee.

Educational Leave

Approval by the relevant trainer/training director of an application by a higher specialist trainee prior to the educational event taking place does not confer automatic approval of educational leave which may be required by the trainee to attend the educational event. Approval of educational leave remains the responsibility of the employer. To apply for educational leave to attend educational events that have been approved by the training body as being appropriate for support from the discretionary fund, higher specialist trainees are required to continue to apply directly to their employer. A copy of the signed application form should be submitted with their application to their employer, as supporting documentation.

Further Information

For further information about discretionary funding for higher specialist trainees please email the Forum of Irish Postgraduate Medical Training Bodies at forum@rpci.ie
Appendix One
Diagrammatic Overview of Application Process

1. Trainee completes reimbursement form. The form is signed by Training Director/Approved Trainer.
2. Trainee applies to employer for educational leave as appropriate.
3. Trainee attends educational event/purchases equipment.
4. Following educational event/equipment purchase, Trainee forwards to Forum completed and signed application with original receipts and certificate of attendance (if applicable).
5. Forum reviews and verifies the application form for completeness and logs request.
6. On a quarterly basis, the Forum forwards a list of verified applications to the relevant Training Body to issue payment to trainee.
7. If approved, Training Body issues payment to trainee.
Appendix Two
Frequently Asked Questions By Higher Specialist Trainees

1. **Is there a list of events/courses approved for the Discretionary Fund?**
   No, there is no set list of events/courses that are approved. The approval process is as follows:
   - Your designated specialist trainer must support the claim by signing the reimbursement form.
   - The Forum of Irish Postgraduate Training Bodies reviews the reimbursement form for completeness. If appropriate, the Forum recommends to the Postgraduate Training Body payment of the claim.
   - The Postgraduate Training Body reviews the claim and if appropriate issues payment.

   Events/equipment that are educationally relevant and support your training will be considered.
   Courses/events already supported by the HSE will not be considered.

2. **Can this fund be used for online journals?**
   No, the fund is geared towards attendance at educational events/courses or specialist medical equipment required specifically for higher specialist training. It is anticipated that the trainees will access online resources available through their employer or training programmes.

3. **Can this fund be used towards the tuition fees for Masters programme/PhD?**
   Yes, the fund can be used towards the contribution of tuition fees if the educational course is relevant to their SpR/SR training. Claims must be made at the end of an academic year and supported by evidence of attendance/participation such as a results letter.

4. **If I am enrolled on a course that runs over one or more years do I need to wait until after I complete the course to claim?**
   No, but you must wait until after the completion of the academic year. The reimbursement form must be supported with evidence of participation for that academic year such as a results letter.

5. **Do I need to submit a certificate of attendance for my higher degree?**
   Yes, all claims must be supported with evidence of participation. For example, a letter from the educational institute stating you are enrolled and have completed the academic year such as a results letter will be accepted.

6. **Can this fund be used to fund ASMLE?**
   No, the fund must be used towards education events/equipment. Costs associated with medical licensing/registration will not be considered.

7. **Can this fund be used towards the cost of an ACLS course?**
   No, there is a separate Clinical Courses and Examination Refund Scheme for NCHDs operated by the HSE which will contribute up to €450 towards specific HSE approved clinical courses and examinations. This
HSE NCHD Refund Scheme is managed directly by employers and sites. Please contact your employer directly or look at the MET Hub on www.hseland.ie for further information on this refund scheme.

8. **Can I claim towards the purchase of textbooks?**
   Yes. Original receipts must be included with the reimbursement form.

9. **Can this fund be used for exams fees towards membership exams?**
   No, there is a separate Clinical Courses and Examination Refund Scheme for NCHDs operated by the HSE which will contribute up to €450 towards specific HSE approved clinical courses and examinations. This HSE NCHD Refund Scheme is managed directly by employers and sites. Please contact your employer directly or look at the MET Hub on www.hseland.ie for further information on this refund scheme.

10. **Can this fund be used towards travel expenses in relation to membership exams?**
    Yes, the fund can be used for travel expenses incurred relating to membership exams. All such claims will be considered in line with HSE Guidelines regarding travel and subsistence and if approved, will be reimbursed at public sector rates.

11. **Can this fund be used towards travel expenses in relation to mandatory study days?**
    Yes, the fund can be used for travel expenses incurred relating to attendance of mandatory study days. All such claims will be considered in line with HSE Guidelines regarding travel and subsistence and if approved, will be reimbursed at public sector rates.

12. **Can I claim mileage for an event/conference?**
    Yes mileage can be claimed. Each mileage submission must be considered in the context of available public transport. All such claims will be considered in line with the HSE Guidelines regarding travel and if approved, will be reimbursed at public sector rates.

13. **Can I claim for accommodation for an event/conference?**
    Yes, accommodation can be claimed. All such claims will be considered in line with the HSE Guidelines regarding travel and if approved, will be reimbursed at public sector rates.

14. **If I don’t claim the full €500 in the year do I lose the remainder of the funding?**
    No, the discretionary fund is designed as a rolling fund. For each year of training that you are eligible to claim the discretionary fund you can avail up to €500 towards education events/equipment. However, if you do not claim the full €500 the remainder will “roll over” to the next year of training making your available amount to claim €500 plus the amount “rolled over” from the previous year.

    Trainees who have completed their SpR/SR training must make their final claim by September 30th following their completion from the programme. Retrospective claims passed this date will not be considered and the remaining amount of the fund will be returned to the HSE.

15. **The event I want to claim will be taking place in the future – can I claim the fee now if I have paid the registration fee?**
    No, claims will only be considered following the event and must be supported with a certificate of attendance.
16. Can I claim if I am on maternity leave?
Yes, if you hold an NCHD Contract 2010.

17. I am doing research this year, am I eligible for the €500 discretionary fund?
No, this fund is only available to those higher specialist trainees i.e. specialist registrars and senior registrars who:

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- who hold NCHD Contract 2010.

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18. I am in a clinical post for which I am not receiving training credit – am I eligible for the Discretionary Fund?
No, you must be actively enrolled in an Higher Specialist Training programme, receiving clinical credit and hold an NCHD Contract 2010 to be eligible.

19. If I finish training in January can I claim the full €500?
No, SpRs/SRs who complete in January can claim €250. All claims must be made within 3 months of your completion date.

20. How long will it take for the reimbursement to be sent to me?
Once your claim has been reviewed and processed by the Forum of Postgraduate Training a recommendation for payment will be forwarded to your postgraduate training body. These recommendations are sent on a quarterly basis. Your postgraduate will then be in contact to arrange payment.

21. Why am I submitting the reimbursement form to the Forum of Irish Postgraduate Training Bodies and not directly to my Training Body?
The HSE approached the Forum to act as a central body in the processing of the discretionary fund applications to ensure a centralised and standard approach to the reimbursement claims. The role of the Forum is to verify the application and make recommendations regarding payment to the Postgraduate Training Bodies. The Forum does not issue any funding to the trainees.

22. Does the Forum of Irish Postgraduate Medical Training Bodies reimburse me?
No, your Postgraduate Training Body will issue payment. You will receive correspondence from the Forum stating that your application has been processed and that, if appropriate, your claim is being recommended to your training body for reimbursement. Your training body will then organise payment following approval of your claim.