**GUIDANCE ON ELIGIBILITY FOR INTER PROGRAMME TRANSFERS FOR GP TRAINEES IN HEE’s KSS LOCAL PROGRAMMES.**

1. The Inter Programme Transfers (IPT) process has been put into place to provide transparency and clarity when supporting GP trainees who have had an **unforeseen and significant change** in circumstances **since commencing** their GP training programme. Transfers are only supported in these exceptional circumstances, and are not widely available within HEE KSS. They are at the discretion of the GP School, on behalf of the Postgraduate Dean.
2. An unforeseen and significant change in circumstances relates to the following:

* Personal disability as defined by the Equality Act 2010
* Caring responsibilities
* Parental responsibilities
* Committed relationship

1. It should be recognised that transfers are “not an entitlement” (*Gold Guide*) and the decision will be influenced not only by the strength of the personal case, but also the impact of the requested transfer on other trainees, on the programme from which the trainee is seeking to transfer, and there being vacancies available in the programme to which trainees are applying.
2. Inter-Deanery transfers are managed nationally, and further information can be accessed via the IDT page on this PGMDE support portal: HEE KSS IPT transfer applications are managed mirroring the application windows for IDTs, which take place twice annually, in February and August. Applications cannot be made outside these windows. Deadlines for confirmation of transfers will be published for each round.
3. HEE in KSS will accept Inter Programme Transfer (IPT) requests within the first year of appointment but the transfer itself will not be considered appropriate until after a minimum 12 months in the original appointed post.
4. Inter-programme transfer arrangements need to balance the following issues:

* HEE KSS’s duty of care to individual GPSTRs with genuine personal or health reasons requiring a change of location
* The legitimate concerns of programmes and Trusts regarding the disruption of complex rotations and safe provision of patient care
* The potential adverse impact on an individual’s programme and the educational process

1. The final decision for any transfer will rest with the Head of GP School, working in collaboration with the Training Programme Directors of both schemes impacted by the transfer request.
2. Changes to personal circumstances must have occurred before making an application and applications cannot be made based on expected or anticipated future events.
3. All applications will require current statements and supporting evidence from medical specialists and / or local authorities, so it is recommended that trainees allow sufficient time to collate this information. Applications without supporting evidence will not be successful.
4. Information provided on the application form and any supporting information should be completed to the best of the trainee’s knowledge. If it is subsequently discovered that any statement is false or misleading, or that any relevant information has been withheld then the application will be disqualified or, if a transfer has already been confirmed, then this may be withdrawn. It may also be appropriate to report any such incidents to the General Medical Council.
5. For trainees working LTFT this status cannot be guaranteed after any transfer and will depend upon capacity in the new programme area.
6. Although HEE KSS will endeavour to support eligible trainees to undertake an IPT, the transfer itself will only be possible in the event that there is sufficient placement capacity in the scheme to which the transfer is requested, and that the transfer will not destabilise the original programme or department.
7. Eligibility is therefore not a guarantee that an individual can actually transfer to a specific scheme. It is recommended that you include any schemes to which you would accept a transfer in your application, indicating your preferences in order, to maximise your chances of getting a transfer.
8. Applications must be signed by your Educational Supervisor, Training Programme Director, and (for transfers before the start of ST3) by the Medical Staffing Manager of the originating Trust before being submitted to the GP School.
9. Deadlines for approval and acceptance of transfers will be defined in advance, and will mirror those of the Inter-Deanery Transfer process.

**Criteria for a change in personal circumstances**

1. Trainees are only able to apply for a transfer under one of the following criteria. In the event that limited transfer placements are available, priority will be given to trainees fulfilling criterion 1.

**Criterion 1: Own Disability**

1. The trainee has developed a **disability** as defined by the Equality Act 2010 (see below) following the commencement of their current programme for which treatment is an absolute requirement and where the treatment, care or social requirements can only be carried out in the geographical area the trainee has applied to relocate to, as confirmed by a report from Occupational Health or their medical specialist.

**Criterion 2: Primary Caring responsibilities for disabled person**

1. The trainee is the **primary carer** for someone who is **disabled** as defined by the Equality Act 2010 (see below), expected to be a partner, sibling, parent or child, and these responsibilities have changed significantly following the commencement of their current programme, resulting in the need to move location, since the commencement of training in their current training region. Trainees who provide care for a person as part of a group of carers, e.g. a family, are not eligible to apply under this criterion.

**Criterion 3: Parental responsibilities**

1. The trainee is a parent or legal guardian of a child (or children) under the age of 18 who reside primarily with them, and for whom they have had **significant change in caring responsibilities** following the commencement of their current programme, resulting in the need to move location. Please note: This criterion is based on childcare. Pregnancy is not part of this criterion. A trainee whose sole criterion is that she - or a partner - is currently pregnant will not be regarded as eligible.

**Criterion 4: Personal circumstances**

The trainee has had a significant change in personal **circumstances** due to a committed relationship that could not have been foreseen following the commencement of their current programme, resulting in the need to move location. Please note: a committed relationship refers to the relationship a trainee has with a partner/spouse, and not with other family members or friends.

The trainee’s partner has received a job offer in another location within the region. The must be able to provide evidence of this with your application.

**Definition of 'disability' under the Equality Act 2010**

1. The Equality Act 2010 defines a disabled person as someone who has a physical or mental impairment, which has a substantial and long-term adverse effect on their ability to carry out normal day-to-day activities. For the purposes of the Act:

* *substantial* means more than minor or trivial
* *long-term* means that the effect of the impairment has lasted or is likely to last for at least 12 months (there are special rules covering recurring or fluctuating conditions)
* *normal day-to-day activities* include everyday things like eating, washing, walking and going shopping.

**Eligibility Criteria**

1. Trainees must have experienced a **change** in their personal circumstances relating to one of the four criteria above **after commencement** in their current training programme and before an application is submitted.
2. Trainees must be **at least** 12 calendar months from the date of completion of their training programme when starting in post within the new programme following a transfer.
3. IPT requests will be subject to the trainee being in receipt of a satisfactory outcome ARCP 1. Trainee must have a letter of support from the Postgraduate Dean if submitting an application with an outcome 2 or 3.
4. Trainees are also required to confirm they have no unresolved ‘cause for concern’ related to their revalidation as a doctor, which may have been highlighted via the ARCP. Any unresolved cause for concern may result in trainee’s application not being eligible for the IPT process.

**Evidence to support Criterion 1 – Own Disability**

1. A report from the trainee’s Occupational Health, GP or medical specialist involved in their treatment or care, which will be required to:

* confirm that the trainee has a disability according to the Equality Act 2010
* describe the nature of the ongoing treatment and frequency of the follow up required
* state why the reasonable adjustment of a transfer needs to be made and how a move would support the trainee in their change of circumstances

**Evidence to support Criterion 2 - Primary Carer Responsibilities**

1. You are required to provide the details of the person you are the primary carer for. You are also required to provide details of the care plan for the person that you care for. The care plan outlines the care you provide, any other services the person being cared for uses, alternative arrangements you have considered and how you plan to manage these responsibilities with work.

A letter from the General Practitioner or Social Worker of the person you are the primary carer for. They should write a report on the level of care you provide and sign the declaration. It is imperative that it is confirmed on the letter that the person that you are the primary carer of has significant ill health and/or is disabled as defined by the Equality Act 2010

**Evidence to support Criterion 3: Parental/Guardian Responsibility**

1. A statement on the application confirming the trainee’s changes in caring responsibilities and this should also be acknowledged by the trainee’s Educational Supervisor/Training Programme Director to say they are aware of the changes. Trainees must also submit a birth certificate for each child listed.

that you are the parent or legal guardian of. You must give a brief overview of your change in personal circumstances relating to your parental or guardian responsibilities. Please note that pregnancy alone is not an eligible reason. You MUST provide copies of the FULL birth or adoption certificate(s) for the each of the children listed on the form when uploading evidence to the application portal. Parent(s) name(s) should be detailed on the certificate along with the full name of the child(ren).

1. Trainees applying under Criterion 3 must also provide supporting documentation to evidence the need to transfer to the prospective region. The evidence must include the full address of the establishment and full name of relevant person(s). Examples below:

• If you are applying because your partner has a job/job offer in another region and this affects your parental responsibilities, you will need to provide evidence of their employment (e.g. signed work contract)

• If you are applying because your child(ren) family support live in another region, you will need to provide proof of address of your partner / family members living in the prospective region (e.g. utility bills dated within 6 months, phone bills dated within 6 months, bank statement dated within 6 months, tenancy/mortgage agreement, etc.)

• If you are applying because your child(-ren) require additional support available in another region you will need to provide additional evidence (e.g. your child’s special educational needs report, official report from medical professional/educational psychologist, official report from the hospital, etc.)

**Evidence to support Criterion 4: Committed Relationship**

1. Trainees applying for Criterion 4 must also provide EITHER a marriage certificate or civil partnership certificate (in full). Marriage certificates from other countries will only be accepted if they include an official translation. OR 2 pieces of evidence of shared financial responsibility (all bills / statements to be dated within 6 months of the application):

• Joint bank account statement (with names of both partners)

• Utility bill (with names of both partners)

• Joint mortgage/tenancy agreement (with names of both partners)

OR, 1 piece of evidence of shared responsibility from the list above and 1 piece of evidence from the following list OR any 2 pieces of evidence from the following list:

• Evidence of regular transfer of funds to partners account on bank statement (two or more transfers over a few months would be sufficient) Please ensure transfers are highlighted.

• Letter of intent from mortgage lender/rental company (with names of both partners)

• Letter of intent to marry from religious leader (e.g. signed and dated letter from a priest including the name of both partners)

• Evidence of travel to partner’s location on several occasions (train/coach/plane confirmation emails or tickets that show date of travel and destination. Two or more over a few months would be sufficient. Petrol receipts are not accepted)

• Evidence of accommodation or semi-residing over a period of time in a particular region.

• Beneficiary documents

• Wedding/venue deposit receipts (with names of both partners)

• Phone records that show calls to partner over a period of time (Partner’s number must also be proven via a copy of their phone bill summary sheet). Please highlight the telephone number and reoccurrences on the statement. Copies of calls and conversations via messaging applications will not be accepted (i.e. screenshots)

1. If you are applying because your partner has a job offer in another region you will also have to supply evidence of this in addition:

• If your partner is a medical trainee, please provide confirmation of national Training Number (NTN/DRN) letter including start date

• If your partner is non-medic/non-trainee, please provide an official job offer letter and acceptance letter or contract (signed by your partner and their employer), including start date.

• If your partner is self-employed, please provide evidence e.g. a contract demonstrating your partner’s need to move to your preferred region.

• If you are applying because your partner lives in another region you will also have to supply evidence of your partner’s residence in the region that you wish transfer to in addition to the above:

• An official bill dated within 6 months of application clearly stating your partners name and address.

• Utility bill (with full name of your partner, dated within 6 months of application submission);

• Bank statement (with full name of your partner, dated within 6 months of application submission);

• Mortgage/tenancy agreement (with full name of your partner)

1. If you are applying because your partner has a job offer in another region you will also have to supply evidence of this in addition:

• If your partner is a medical trainee, please provide confirmation of national Training Number (NTN/DRN) letter including start date

• If your partner is non-medic/non-trainee, please provide an official job offer letter and acceptance letter or contract (signed by your partner and their employer), including start date.

• If your partner is self-employed, please provide evidence e.g. a contract demonstrating your partner’s need to move to your preferred region.

• If you are applying because your partner lives in another region you will also have to supply evidence of your partner’s residence in the region that you wish transfer to in addition to the above:

• An official bill dated within 6 months of application clearly stating your partners name and address. • Utility bill (with full name of your partner, dated within 6 months of application submission);

• Bank statement (with full name of your partner, dated within 6 months of application submission);

• Mortgage/tenancy agreement (with full name of your partner);

**Criteria not considered constituting a change in circumstances:**

1. The following will *not* be considered to be a material change in circumstances and will not be considered for an IPT:

* Risk of ill health consequent on working apart from family/partner
* Complexity or organisational effects upon the individual or family caused by working apart
* Cost of / and or time spent travelling
* Absence of time for personal study
* Purchase of home in another area of HEE in KSS since acceptance of original offer of training programme
* Applying for/securing a school place for a child in area outside existing training programme area

1. The above lists are for guidance only and are not exhaustive.