

Trainee Guide to Inter Deanery Transfers

Please read this guide carefully before applying for an IDT to ensure you understand the national process and to ensure you meet the eligibility criteria and supply the correct documents along with your application.

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Introduction

The National Inter Deanery Transfer (IDT) process has been put in place to support medical trainees who have had an unforeseen and significant change in circumstances since commencement of their current training programme.

'An unforeseen and significant change in circumstances' should relate to:

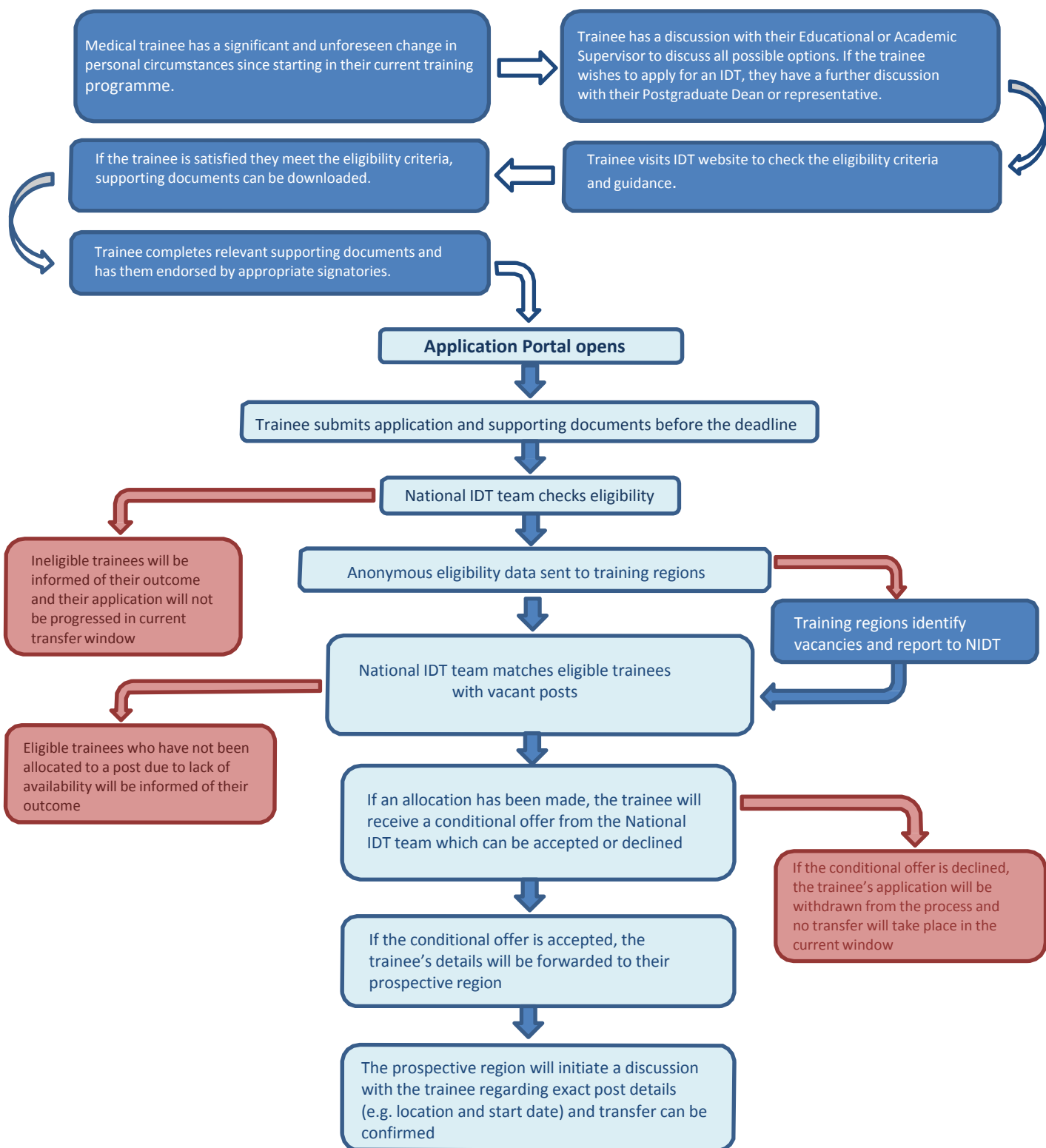
- personal disability as defined by the Equality Act 2010 or
- caring responsibilities or
- parental responsibilities or
- a committed relationship

It should be recognised that transfers are not an entitlement. IDTs will depend on compliance with the eligibility criteria and evidence requirements and there being vacancies in the region (or regions) into which trainees are applying to move.

Please note that the National IDT arrangements do not apply to foundation, dental or military trainees in any level of training. In such instances, please contact your local Foundation School or Postgraduate Dean for information regarding transfer processes.

This guide will be reviewed between National IDT windows and therefore changes may occur ahead of future application windows. All trainees should carefully read this guide each time an application is submitted and, if necessary, contact the National IDT team to discuss any changes that may have occurred.

Process Overview



Guidance notes

Before applying

1. Trainees must discuss alternative support arrangements with their Educational or Academic Supervisor and their Postgraduate Dean before applying for an IDT. Having fully considered all alternatives, trainees will be able to apply. If trainees decide to apply, they should inform their Training Programme Director (TPD).
2. Trainees must demonstrate that a significant change to personal circumstances has occurred that could not have been foreseen at the time of commencing their current training programme. The change must involve:
 - a disability *or*
 - caring responsibilities *or*
 - parental responsibilities *or*
 - a committed relationship
3. Changes to personal circumstances must have occurred before making an IDT application and applications cannot be based on expected or anticipated future events.
4. Trainees are able to request transfers to another region, but are not able to specify where within that region they wish to be placed at the IDT application stage. This information will be discussed between trainees who have been allocated a transfer and their new region during the finalisation stage of the process.
5. When considering the most suitable area for relocation, trainees may wish to rank regions adjacent to their first choice as second or third choices. It is possible to list up to three preferences of region at the application stage. However, trainees must only apply to transfer to a region in which they would wish to train.
6. Trainees should ensure the region to which they are requesting a transfer manages a training programme for the specialty they wish to join. Some training programmes cross regional borders and may have their administrative base in a different region to where the trainee wishes to train. Before making an application, it is advisable for trainees to consult a region's website for further information on whether or not their specialty programme is managed by their preferred training region.
7. Training programmes in some specialties are offered as run through, while in other training regions the same specialty is offered as a core programme. Trainees need to be aware that their existing training arrangements may not be honoured on transferring to another deanery. For example, where there are differences in programmes offered with respect to run through or core between deaneries, the local arrangements of the trainee's current deanery may not be manageable in the new deanery.

Application stage

8. This is a UK-wide process that takes place twice a year. Each application window will remain open for 4 weeks and will open in:
 - February (Window 1) and
 - August (Window 2)

All applications must be made via the National IDT online application portal (<https://nationalidt.gtisolutions.co.uk/Home/Guest>)

9. Window 1 - Trainees who apply during the February window should expect to receive information on their outcomes by the middle of April and transfer between August and October of the same year.

Window 2 - Trainees who apply during the August window should expect to receive information on their outcomes by the middle of October and transfer between February and April of the following year.

10. It is the trainee's responsibility to submit the correct supporting documents, with all sections completed and submitted before the application submission deadline. In order for the application process to remain consistent to all trainees, the National IDT process must operate strictly in accordance with the published timescales and deadlines. Trainees will not be able to submit an application on the portal once the deadline has passed.
11. All trainees will be required to submit new versions of the Deanery Document and the Supporting Document which relates to their application criterion each time an application is made. Trainees will not be able to re-submit documents which have previously been submitted for previous transfer windows except certificates (such as birth/marriage/civil partnership) and examples of shared financial responsibility which may be re-submitted.

12. Information provided at the application stage, including information supplied on the application form and any attached supporting documents, should be completed to the best of trainee's knowledge. If it is subsequently discovered that any statement is false or misleading, or that relevant information has been withheld, particularly on eligibility, criminal convictions and fitness to practice, an application may 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.
13. **The National IDT team will process the entire application form and all supporting documents, including the review of all information contained within for the purposes of checking eligibility. An anonymous report of basic trainee information (Application ID, Specialty, Level of Training, Current Region, Requested Region(s), Criterion applied under and request for LTFT) will be sent to colleagues in training regions across the UK when eligibility has been determined.**

Allocation and Offer stage

14. Training regions will supply information to the National IDT team regarding available vacancies for the transfer process. Highlighting vacancies for the National IDT process is a local process which will be carried out by each training region.
15. If there are more IDT requests than vacancies, priority will be given to trainees with a significant change in circumstances due to their own disability. Applications from trainees with a change in circumstances related to caring or parental responsibilities or committed relationships will be considered equally afterwards.
16. If there are insufficient vacancies to facilitate a move for all trainees requesting a particular transfer, eligible trainees of equal weighting (see point 14 above) will be allocated for transfer using a validated randomisation algorithm. The administration for this stage of the process is carried out in conjunction with a lay representative and a member of the Junior Doctors Committee.

Trainees who have not been allocated to a transfer owing to lack of suitable vacant posts, can reapply when the next transfer window opens. There is no waiting list system.
17. The IDT conditional offer process will consist of two iterations. The first iteration will allocate vacancies confirmed by training regions and the second will allocate vacancies created by first iteration transfers. The second round is at the discretion of the regions and some may not wish for this to take place for their vacancies.
18. Trainees who have been matched to vacant posts will be conditionally offered a transfer by email by the National IDT team and will have to respond to this conditional offer within the designated timeframe.
19. Once successful trainees have accepted their conditional offer to transfer, the National IDT team will have the information they provided at the application stage forwarded to their new region. The new region will contact the trainee to confirm their start date and discuss any requirements as necessary. The trainee should then work their three month notice with their current region.

Less than Full-time (LTFT)

20. A trainee's LTFT status cannot be guaranteed by the National IDT team and a transfer into a LTFT post will depend on capacity within the new region.
21. Should a LTFT vacancy be declared for the National IDT process then this can be allocated. A LTFT trainee will still be considered for a transfer into a full-time vacancy should a suitable one exist but the trainee will have to fulfil the local requirements of obtaining LTFT status within the new region.

Out of Programme (OOP) and maternity leave/pregnancy

22. OOP arrangements are at the discretion of the trainee's current training region and prospective regions are not obligated to maintain these arrangements for new trainees. For this reason, trainees who are currently OOP should not apply for a transfer which will take place before their return to the training programme. Instead, OOP trainees should apply for a transfer due to take place as close to their return to training as possible.
23. Trainees requesting an IDT while pregnant or on maternity leave should also be applying during the transfer window which will allocate placements with start dates nearest to the date that they would be planning to return to training in their current region.
24. Those trainees who are out of programme will be required to submit additional ARCP/RITA documents (see Supporting Evidence section below).

Academic Trainees

25. Academic Clinical Fellowship (ACF) and Clinical Lecturer (CL) trainees should first approach their Academic Supervisor to discuss their situation and they will need to obtain written agreement from both their current academic provider (Medical School or Higher Education Institution holding the ACF or CL award) and the academic provider they wish to move to. This written confirmation should state that the releasing institution agrees to the NIHR funding being released, and that the receiving academic institution is able to deliver the academic training.

Once agreed by both academic providers, the ACF or CL trainee will need to get written agreement from the NIHR for the transfer of their funded award, or where the award has been locally funded the agreement of their funding body. The trainee needs to supply evidence of these agreements with their application.

The above guidance applies only in England. Academic trainees in Scotland, Wales and Northern Ireland should approach their academic leads and Postgraduate Deans in order to have their individual circumstances considered.

Complaints process

26. Trainees who feel that their application has not been managed in accordance with the published guidance can submit supporting evidence of this in a formal complaint. The National IDT Complaint Policy can be found on the following [website](#).

There is no appeal process for the outcome of an IDT application where published process has been correctly followed.

Criteria for a change in personal circumstances

27. Trainees are only able to apply for a transfer under one of the following criteria.

Criterion 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 their Occupational Health Physician, GP or their medical specialist.

Criterion 2 - 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 - 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 - 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 (e.g. boyfriend, girlfriend, husband or wife) and not with other family members or friends.

Definition of 'disability' under the Equality Act 2010

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.

Some conditions, such as a tendency to set fires or addictions to non-prescribed substances, are specifically excluded. People who have had a disability in the past that meets the above definition are also covered by the scope of the Act. There are additional provisions relating to people with progressive conditions. People with HIV, cancer and multiple sclerosis are protected by the Act from the point of diagnosis.

Eligibility Criteria

28. Trainees must have experienced a change in their personal circumstances relating to one of the four criteria listed above after commencement in their current training programme and before an application is submitted. Trainees must have been in their current training programme and in their current region for at least 9 months at the point of application.

29. Trainees must be at least 12 calendar months from the date of completion of their training programme when starting in post within the new region following a transfer. Trainees who will be within 12 calendar months of the completion of their training programme should contact their Postgraduate Dean to discuss alternative arrangements.

30. Trainees must be able to take up a new placement in a new region within the national timetable for transfers. It will not be possible to defer start dates for those who are due to return from OOP or maternity leave on a future date which will be included within the timetable for a future transfer window.

31. IDT requests will be subject to the trainee being in receipt of a satisfactory outcome ARCP 1 or RITA C.

Trainees are also required to confirm they have no unresolved 'cause for concern' which may have been highlighted via the ARCP or RITA process. Any unresolved cause for concern may result in trainee's application not being eligible for the IDT process.

All trainees are asked to disclose if they have a criminal record in the UK or in any other country. Trainees to training posts are exempt from the Rehabilitation of Offenders Act 1974 and can therefore be asked to disclose 'spent' convictions that they would otherwise not have to declare. If you would like to discuss any convictions, police investigations or fitness to practise proceedings, contact fitnesstopractise@southlondon.hee.nhs.uk

Failure to disclose this information could result in the withdrawal of an application from the process.

32. Trainees must have the correct immigration status to be eligible to transfer.

Trainees who hold a Tier 2 visa within one of the HEE regions can request a transfer to another HEE region. However, Tier 2 visa holders who wish to transfer into or out of Wales, Scotland or Northern Ireland will be unable to do so. If transferring between English regions (for which HEE has a single sponsor) you will not need to apply for a new visa.

33. Trainees must be available to start in post during the designated timetable for each transfer window (See 'Application Stage' point 9 above)

34. **In order to be eligible to apply for a transfer under the IDT process trainees must supply the mandatory evidence to support their application as outlined in the ‘Supporting Documents’ section below.**

Further information and clarification of the National IDT eligibility criteria can be found in the FAQ section of our website: <http://specialtytraining.hee.nhs.uk/inter-deanery-transfers/faqs-and-guides/>

Supporting documents

35. Trainees applying for an IDT will need to complete an online application form, stating clearly the significant and unforeseen change in circumstances that has taken place since they started training.
36. Trainees will also be required to submit evidence supporting their application before the application deadline. Depending on the criterion under which a trainee is applying, further supporting documents are also required as mandatory pieces of evidence. Please see below for a list of the documents required for each criterion.
37. All trainees are required to submit a copy of their most recent ARCP outcome which must have been received while on their current training programme. Trainees who are currently out of programme for any reason should also submit the last outcome form received while still in programme. These documents are included within the list of mandatory documents and an application cannot be progressed without them.
38. Trainees are responsible for submitting completed applications, with all supporting documents included and are therefore advised to check that all mandatory documents have been submitted along with an online application form. It will not be possible to facilitate a transfer for any application that does not include the correct documentation completed to the required standard.
39. All trainees will be required to submit new versions of the Deanery Document and the Supporting Document which relates to their criterion each time an application is made. Trainees will not be able to re-submit these documents if they have previously been submitted for earlier transfer windows.

Certificates (such as birth/marriage/civil partnership) and examples of shared financial responsibility may be re-submitted.

Signatories for documents

40. The Deanery Document must be signed by the trainee’s current Postgraduate Dean or their nominated representative for the IDT process. The nominated representative will be the administrative lead for IDTs within a training region and will not be the Training Programme Director, Head of School, Educational Supervisor or any other regional contact. To find out whom to send this document to for signing, please refer to the *Local IDT contacts for trainees* directory [here](#).
41. Supporting Document A, B, C, D should be signed by the appropriate signatory as outlined on the document and below. Please ensure you obtain appropriate signatories for these documents as it will unfortunately not be possible to accept alternatives.

Time frame for getting documents completed

42. The National IDT team must be able to make sure that personal circumstances are current. Therefore, the Deanery Document and relevant Supporting Document (either A, B, C or D) must be completed and signed by the all signatories a maximum of eight weeks in advance of the submission deadline. It will not be possible to accept template documents that were completed for previous transfer windows.
43. Date restrictions do not apply to birth, marriage or civil partnership certificates or examples of shared financial responsibility.

Evidence to support Criterion 1 – ‘Supporting Document A’

A copy of Supporting Document A can be found on the National IDT website and must be submitted along with an IDT application made under Criterion One (Own Disability). It will not be possible to accept alternative documents in place of ‘Supporting Document A’.

Supporting Document A must be completed by the trainee and by an Occupational Health Physician, GP or medical specialist involved in the trainee's treatment or care, who 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.

All sections of Supporting Document A must be completed.

Evidence to support Criterion 2 – 'Supporting Document B'

A copy of Supporting Document B can be found on the National IDT website and must be submitted along with an IDT application made under Criterion Two (Primary Carer Responsibilities). It will not be possible to accept alternative documents in place of 'Supporting Document B'.

Supporting Document B must be completed by the trainee and by the General Practitioner or Social Worker of the person being cared for by the trainee and will consist of:

- a statement confirming the trainee's role as primary carer for the person being cared for.
- a care plan for the person being cared for.

All sections of Supporting Document B must be completed.

Evidence to support Criterion 3 – 'Supporting Document C'

A copy of Supporting Document C can be found on the National IDT website and must be submitted along with an IDT application made under Criterion Three (Parental/Guardian Responsibility). It will not be possible to accept alternative documents in place of 'Supporting Document C'.

Supporting Document C must be completed by the trainee and also a signatory. The signatory must be the trainee's current Educational Supervisor or Training Programme Director who will confirm, to the best of their knowledge, that they are aware of the change in personal circumstances. This document will not be used by Educational Supervisors or Training Programme Directors to refuse or deny a transfer request.

All sections of Supporting Document C must be completed.

Trainees applying for Criterion Three must also submit a birth certificate for each child listed on Supporting Document C.

Evidence to support Criterion 4 – Supporting Documents D

A copy of Supporting Document D can be found on the National IDT website and must be submitted along with an IDT application made under Criterion Four (Committed Relationship). It will not be possible to accept alternative documents in place of 'Supporting Document D'.

Supporting Document D must be completed by the trainee and also a signatory. The signatory must be the trainee's current Educational Supervisor or Training Programme Director who will confirm, to the best of their knowledge, that they are aware of the change in personal circumstances. This document will not be used by Educational Supervisors or Training Programme Directors to refuse or deny a transfer request.

All sections of Supporting Document D must be completed.

Trainees applying for Criterion 4 must also provide either a marriage certificate or civil partnership certificate. If not yet married/ in a civil partnership, trainees can provide any 2 of the following:

- Evidence of shared financial responsibility (Joint bank account statements, utility bills, joint mortgage/tenancy agreement) You may provide 2 of these if you cannot provide anything else on the list. Or you can give one piece of financial evidence and any one of the other items on the list.
- Venue Deposit receipts/wedding receipts
- Evidence of regular transfer of funds to partners account (bank statement)
- Letter of intent from mortgage lender/rental company
- Letter of intent to marry from religious leader
- Evidence of travel to partners location on several occasions (train/coach tickets)

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 to the above.

- If your partner is a medic, please provide confirmation of training letter including start date
- If your partner is non-medic, please provide official job offer letter or contract, including start date

Overview of mandatory supporting documentation required from each trainee:

If applying under **Criterion One**, a trainee must submit:

- A copy of their most recent ARCP Outcome form which relates to their current training programme.
- A completed Deanery Document
- A completed Supporting Document A

If applying under **Criterion Two**, a trainee must submit:

- A copy of their most recent ARCP Outcome form which relates to their current training programme.
- A completed Deanery Document
- A completed Supporting Document B

If applying under **Criterion Three**, a trainee must submit:

- A copy of their most recent ARCP Outcome form which relates to their current training programme.
- A completed Deanery Document
- A completed Supporting Document C
- A birth certificate for each child listed on Supporting Document C

If applying under **Criterion Four**, a trainee must submit:

- A copy of their most recent ARCP Outcome form which relates to their current training programme.
- A completed Deanery Document
- A completed Supporting Document D
- Either a marriage certificate, a civil partnership certificate or any 2 of the following:
 - Evidence of shared financial responsibility (Joint bank account statements, utility bills, joint mortgage/tenancy agreement) You may provide 2 of these if you cannot provide anything else on the list. Or you can give one piece of financial evidence and any one of the other items on the list.
 - Venue Deposit receipts/wedding receipts
 - Evidence of regular transfer of funds to partners account (bank statement)
 - Letter of intent from mortgage lender/rental company
 - Letter of intent to marry from religious leader
 - Evidence of travel to partners location on several occasions

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 to the above.

- If partner is a medic, please provide confirmation of training letter including start date
- If partner is non-medic, please provide official job offer letter or contract, including start date

Trainees who are **Out of Programme** must also submit:

- The most recent ARCP/RITA outcome form received while still in programme as well as most recent OOP Outcome

Academic trainees must also submit:

- A letter of support from their current Academic Supervisor
- A letter of support from their prospective Academic Supervisor
- A letter of support confirming the transfer of the academic award from the funding body

Templates of Supporting Documents A, B, C and D and the Deanery Document will be available on the following [webpage](#) eight weeks ahead of each application window submission deadline.

Please make sure you use the checklist within the templates to ensure you have included all required documentation with your application.