

Phase 2 Allocation and Pre-allocation Policy

Policy Code:	MS-CUR-007-082026 V4
Policy owner:	Programme Manager
Implementation date:	August 2026
Review date:	July 2027
Related procedures:	<u>Student Guide to the Phase 2 Allocation Process</u>

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Version History

Version	Approved by	Revisions made	Date
V4	Chair's action	Updated criteria and travel information	04/08/2026

1. Purpose

This document is designed to provide clarity to students in year 2 of the medical degree as to the process undertaken for placement allocations and to give students, who have special circumstances, the opportunity to apply to be allocated to an appropriate local education provider (LEP). It provides staff, students, and advisors with clear information regarding the UoBs placement allocation principles and processes, as well as on the authority and responsibilities of those involved in the process. Submitting a pre-allocation request does not give students automatic placement at their preferred LEP, their application will be reviewed against the criteria outlined below and the supporting evidence provided.

The purpose of this policy is to provide a fair, transparent and consistent framework for allocating students to Phase 2 base hospitals, while recognising that some students may have personal, health, disability, caring, safeguarding or other exceptional circumstances that require individual consideration.

2. Scope

The policy applies to all year 2 FMHS students intending to continue into their third and fourth years of medical education. The policy applies on the basis that students will have met their conditions to progress including demonstrating they have met the required academic standards, are up to date with their fee payments and have completed the appropriate DBS checks.

This policy also applies, where relevant, to students returning from interruption, repeating students, and students entering Phase 2 at a non-standard point, subject to the specific provisions below.

3. Legislative context

This policy will be applied consistently with the University's duties under equality legislation, including the duty to make reasonable adjustments for disabled students, relevant consumer protection requirements, data protection obligations, the University's student contract and regulations, and the OIA Good Practice Framework.

4. Policy statement

This policy sets out the rules, criteria and evidence requirements surrounding placement allocation to LEPs. It provides the framework for students who have a need to be allocated to an appropriate LEP using a pre-defined pre-allocation criteria. In addition, it explains the process of preference-based allocation to allocate the remaining students.

5. Student voice and individual circumstances

The University recognises that placement allocation can have a significant impact on students' studies, wellbeing, caring responsibilities, disability-related needs, family life and financial circumstances. Students will be given a clear opportunity to explain their circumstances in their own words as part of any pre-allocation request.

The student's own account will be considered alongside relevant supporting evidence. Decisions will not be based solely on diagnosis, labels or documentation,

but on the practical impact of the student's circumstances and whether the requested allocation is necessary and reasonable within the requirements of the programme.

The University will apply this policy fairly and consistently, while allowing reasonable discretion where strict application of the criteria would produce an unfair or disproportionate outcome.

6. Responsibility

It is the student's responsibility to read this policy document. Students who wish to apply for pre-allocation must ensure the necessary criteria are met, provide appropriate supporting evidence, and respond according to the deadlines. Failure to do so would result in the application being rejected.

The faculty is responsible for publishing clear deadlines, applying the criteria consistently, considering evidence fairly, keeping appropriate records, explaining decisions, maintaining confidentiality, and signposting students to support and review routes.

7. Relationship with other policies/procedures

- [6 UBMS Student Agreement 2026.pdf](#)
- [MS-CUR-007-082026 V2 Student Guide to the Phase 2 Allocation Process.pdf](#)
- [Reasonable Adjustments Policy](#)
- [UoB FtP Policy.pdf](#)
- [Informal Complaints Guide](#)
- [Academic Related Appeals Guidance for Students](#)
- [Data-Protection-Policy.pdf](#)
- [Student Expenses Form](#)
- [Equal Opportunities Statement | University of Buckingham](#)

8. Policy details

Phase 2 of the MB ChB programme is delivered in a variety of clinical settings. Students will be allocated to a base hospital according to this policy. Students will be expected to travel during some of the phase 2 blocks. Students are expected to make their own individual travel arrangements. It is anticipated that students will reside near their base hospital during the programme.

Students should expect travel within and around their base hospital region. The faculty will provide students with information about expected travel patterns, placement requirements and available support as early as reasonably possible.

Once allocations have been confirmed, students will not normally be permitted to change base hospital. Requests for a change will only be considered where there are exceptional new circumstances, a disability-related need, a pregnancy or maternity-related need, a safeguarding concern, or another compelling reason that could not reasonably have been addressed through the original allocation process. The University cannot guarantee that a change will be possible, but each request will be considered individually, taking account of student need, placement capacity, professional requirements, patient safety and fairness to other students.

9. Pre-allocation to base hospital site

The University will not accept applications for pre-allocation placement purely based on where a student or their family lives or prefers to be.

To be considered for pre-allocation to a particular LEP based on personal circumstances, applicants must meet one of the following criteria and provide compelling evidence as described in further detail in the later sections

- **Criterion 1:** You are a parent or legal guardian of a child or children under the age of 18 who reside primarily with you or for whom you have significant caring responsibilities.
- **Criterion 2:** Primary Caring Responsibilities
- **Criterion 3:** You have a health condition or disability for which ongoing follow up for the condition in the specified location is an substantial and evidenced need.
- **Criterion 4:** Extraordinary Circumstances

General points

- Applicants are required to complete the pre-allocation form found on Moodle.
- Applicants must ensure that all supporting evidence required for their pre-allocation application is provided at the time of application, uploading all supporting documentation to the pre-allocation form.
- You can only apply for personal circumstances based on your current situation.
- You are not allowed to link your application for personal circumstances to another student in the process.
- Your application will need to be supported by an appropriate independent professional. Dependant on the criteria, this might be a Midwife, GP/Doctor, Headteacher, Social Worker or an occupational health physician.
- Application and approval for pre-allocation to a particular LEP base does not mean that there will be pre-allocation to preferred locations within or associated with the base hospital or for phase 2 activities more generally.
- If you need to be in a geographical area based on your personal circumstances, you can apply for pre-allocation to an LEP within a reasonably commutable distance to your address linked to a criteria below.
- To be considered for pre-allocation on the grounds of personal circumstances, you must meet one of the following criteria.

Reasonable adjustments and inclusive practice

Pre-allocation to a particular LEP, geographical area or reasonable commuting distance may be considered as a reasonable adjustment where a student has a disability or long-term health condition that creates a substantial disadvantage in relation to placement allocation, travel, access, continuity of support or participation in Phase 2.

Pre-allocation is not the only form of reasonable adjustment. The University may also consider other forms of support, including placement planning, travel-related adjustments, timetable considerations where feasible, communication support, access arrangements, occupational health input, or liaison with the relevant LEP.

The University will consider each request individually. Decisions will take account of the student's own account of the barriers they experience, relevant professional evidence where required, occupational health or disability support advice where appropriate, placement capacity, patient safety, competence standards, professional requirements and the need to maintain academic standards.

Where a requested adjustment cannot be implemented, or where the University considers that an alternative adjustment is more appropriate, the student will be given an explanation of the decision.

1.1 Criterion 1: You are a parent or legal guardian of a child or children under the age of 18 who reside primarily with you or for whom you have significant caring responsibilities.

Pregnancy alone will not normally meet Criterion 1 unless the student already has parental or significant caring responsibilities for a child. However, pregnancy, maternity-related needs, birth timing, health-related concerns or placement safety issues may be considered under the health, reasonable adjustment, occupational health, interruption of studies, or late exceptional circumstances processes, as appropriate.

It is expected that you and your child(ren) will remain at your current address and application for pre-allocation will be to the LEP within a reasonably commutable distance of your address.

If you and the child(ren) do not normally reside together, this should be referred to on the application form, and information supplied as to why the caring responsibilities remain equally significant.

The Panel will consider the student's actual caring responsibilities, the child's usual residence, school or childcare arrangements, the availability of alternative care, and whether the requested allocation is necessary rather than preferred.

You are required to supply the following supporting evidence:

- A copy of birth certificate(s) of the child(ren). For legal guardians, a copy of the legal document that confirms your status for the child named in the birth certificate.

- Proof of current address.
- A statement from a professional who can confirm that they know you and has a professional working relationship with the child(ren) and yourself and can confirm that you have a significant caring responsibility for a child or children under 18. The signatory must be:
 - over 18.
 - have a relevant professional working relationship with the applicant and their child(ren) e.g., Midwife, GP/Doctor, Headteacher, Social Worker.
 - not be related to the applicant by birth or marriage.
 - not be in a personal relationship with the applicant.
 - not live at the same address as the applicant.

1.2 **Criterion 2: Primary Caring Responsibilities**

You are the primary carer for someone who is disabled (as defined by the Equality Act 2010). For you to meet this criterion, you must be the primary carer for this person, who would normally be your partner, sibling, or parent. If the person you are caring for is not your partner, sibling, or parent, you will have to explain clearly and present a strong case as to why and how you have the role of primary carer for this person. You must explain why alternative carers cannot be arranged.

If you provide care for a person as part of a group of carers, for example a family, you are not eligible to apply under this criterion and if you do, your application will be rejected.

You are required to provide a care plan to explain how you will combine the responsibilities of a foundation doctor and primary carer, and that you have fully considered local support and resources.

1.3 **Criterion 3: You have a health condition or disability for which ongoing follow up for the condition in the specified location is an substantial and evidenced need.**

You may apply under this criterion where you have a health condition, mental health condition, disability or neurodivergence that creates a substantial evidenced need for allocation to a particular LEP, region or reasonable commuting distance. This may include, but is not limited to, the need to access specialist treatment, maintain essential support arrangements, avoid substantial disability-related travel disadvantage, or implement a reasonable adjustment in the placement context.

You have a health condition (physical or mental health) or disability for which specialist healthcare treatment and ongoing follow up for the condition in the specified location is an absolute requirement.

You must already have an address (and provide proof of address) within the area that you are requesting to be pre-allocated to, and be already receiving treatment for a health condition/disability in that same area at the point of application.

This criterion is in place to ensure that applicants who have already started to receive specialist treatment for an ongoing health condition or disability can be pre-allocated to that area to ensure that they can continue with the treatment.

Most health conditions or disabilities can be managed and treated at any location in the UK, and the expectation is that the majority of applicants will be able to access the support and treatment they need in the location they are allocated to for their placement and transfer their treatment to a new location if this is possible. Not all health conditions will require specialist treatment which is limited to certain parts of the UK. This includes any treatment/medication which is provided by a GP. The expectation is that any current treatment and medication that is already being provided by a GP is transferred to a new location.

Disabled students and reasonable adjustments

Pre-allocation is one possible form of support, but it is not the only form of reasonable adjustment. Where a student has a disability, long-term health condition or mental health condition, the University will consider whether placement allocation, travel expectations, timetable arrangements, communication arrangements, equipment, access requirements or placement support planning may be reasonable adjustments.

Decisions will be made on an individual basis and will take account of the student's own account of the barriers they experience, relevant professional evidence where needed, occupational health advice where appropriate, placement capacity, competence standards, patient safety and the need to maintain academic and professional standards.

Where the University decides not to implement a requested adjustment, or to implement it in a different way, it will explain the reasons.

1.4 **Criterion 4: Extraordinary Circumstances**

The list below provides examples of circumstances that would be considered extraordinary by the national review panel. This list is not exhaustive, and there will other circumstances considered extraordinary.

Athlete

An applicant who is an athlete supported on an international-level representative sports training programme. The requirement would be to remain in a particular location to continue their training.

The application would need to be signed by the national coach/manager with an explanation to why the applicant needs to be pre-allocated at the location requested and not elsewhere, as an athlete may be able to train at any athletics club.

It would be acceptable if the application is part of a national training programme and the rest of the team are based in one location, for example.

Armed Forces Commitments

An applicant who is a member of the armed force reserves. The applicant intends to continue with this commitment whilst undertaking phase 2 training. The applicant therefore needs to access force training during the week and at weekends.

The application would need to be signed by their commanding officer and evidence of why the applicant needs to be at the location requested and not any other reservist training camp would need to be provided.

Adapted housing

An applicant who has a long-term disability which does not impact on their ability to work as a Phase 2 student but requires pre-allocation on the basis of remaining in adapted housing.

It is expected that the applicant would already be living in a home that has been adapted to support their needs, and the request for pre-allocation would be to the area within which that home address falls under.

The application should be supported and signed by a professional from a housing department, social worker or medical practitioner.

Applications submitted under the wrong criterion may be redirected to the appropriate criterion where this can be done fairly and within the timescale. The faculty may ask the student for clarification or additional evidence where this is necessary to consider the request fairly.

Situations **not** valid for pre-allocation include but are not limited to:

- Financial hardship, accommodation ownership, tenancy arrangements or general travel preference will not normally justify pre-allocation on their own. Students experiencing financial hardship will be signposted to relevant University hardship, travel expenses or student support processes. Where financial circumstances overlap with disability, caring responsibilities, safeguarding concerns or other exceptional circumstances, the University will consider the relevant evidence under the appropriate criterion.
- Home ownership/other accommodation circumstances,
- Marriage/other partnership or family/friendship circumstances,

Requests based solely on personal preference, convenience or general lifestyle preference will not normally be approved. Requests connected to religion or belief

will be considered individually where the student explains why the requested location is necessary and provides relevant supporting information. Approval will depend on whether the request meets the threshold for pre-allocation and can reasonably be accommodated within placement capacity and programme requirements.

1.5 Decision-making principles

In considering pre-allocation requests, the Allocation Panel will apply the following principles:

decisions will be based on the published criteria and the evidence provided;

similar cases will normally be treated consistently, while recognising that individual circumstances may differ;

decisions will be proportionate to the evidenced need;

the Panel will consider whether the requested allocation is necessary, rather than simply preferred;

the Panel will consider whether an alternative allocation or form of support could reasonably address the evidenced need;

the Panel will take account of placement capacity, educational requirements, patient safety, professional standards and fairness to other students;

the Panel will keep a written record of the evidence considered, the decision reached and the reasons for the decision.

Approval of a pre-allocation request does not guarantee allocation to a student's preferred LEP unless the Panel has approved pre-allocation to that specific LEP.

1.6 Panel Configuration

All applications for pre-allocation on the grounds of Personal Circumstances will be considered by the Allocation Panel that consists of the Programme Manager and /or Registrar, the Faculty Professionalism Theme Lead and the Clinical Undergraduate Lead or their nominated representative.

Panel members must declare any actual or perceived conflict of interest. Where a conflict exists, an alternative member will be appointed.

The Panel will keep a written record of the evidence considered, the decision reached, the reasons for the decision, and any conditions or limitations attached to the outcome.

Decisions will be made consistently with the published criteria, but the Panel may exercise reasonable discretion where strict application of the criteria would produce an unfair or disproportionate outcome.

Submission of a pre-allocation request does not automatically mean that your request has been approved. The evidence you submit will be reviewed against the criteria listed.

The Panel may contact you if further clarification is required.

1.7

Possible outcomes of a pre-allocation request

After considering the application and supporting evidence, the Allocation Panel may reach one of the following outcomes:

Approved for pre-allocation to a specific LEP

The student will be allocated to a named LEP where the evidence demonstrates that this is necessary because of the student's circumstances and where placement capacity allows.

Approved for pre-allocation to a defined geographical area or region

The student will be allocated to an LEP within a defined geographical area or within reasonable commuting distance of the relevant address, treatment centre, caring responsibility or other evidenced location. This may not be the student's first-choice LEP.

Approved for priority consideration within the allocation process

The student's circumstances will be taken into account during the allocation process, but the evidence does not demonstrate that allocation to one specific LEP is necessary. The student will be allocated as close as reasonably possible to the evidenced need, subject to placement capacity and programme requirements.

Not approved

The application does not meet the published criteria, the evidence does not support the requested pre-allocation, or the requested allocation cannot reasonably be accommodated. The student will enter the standard preference-informed allocation process.

Further information required

The Panel may request further information where clarification is needed to make a fair decision. A deadline will be provided for the submission of any additional information. If the requested information is not provided by the deadline, the Panel may make a decision based on the evidence already available.

Referral for alternative support

Where pre-allocation is not approved, or where pre-allocation alone is unlikely to address the student's circumstances, the Panel may refer the student to relevant support services. This may include Student Support, Disability Support, Occupational Health, the Programme Team or other appropriate services. Referral for support does not guarantee a change to the student's allocation.

Students will be informed of the outcome in writing. The outcome will include the decision, a brief explanation of the reasons for the decision, and information about how to request a review or appeal where the student believes there are valid grounds to do so.

1.8

Appealing the Outcome

If you wish to appeal the decision made, you may do so within 10 working days of receiving your outcome. On the following grounds:

- There are new personal circumstances relating to the Phase 2 pre-allocation criteria that could not be disclosed at pre-allocation
- New evidence to support your existing mitigating circumstances that could not for good reason be disclosed at pre-allocation
- There were material procedural irregularities in relation to the pre-allocation process.

To submit an appeal, you must email fmhs-appeals@buckingham.ac.uk within the stated timeframe.

For further information about the appeals process, please contact fmhs-quality@buckingham.ac.uk

If a student is not satisfied with the outcome a review can be requested to ensure that all procedures have been followed.

The review will be considered by a person or panel not involved in the original decision. The review will not normally be a rehearing and will not consider simple dissatisfaction with the allocated site.

Students will receive a written outcome explaining the decision and the reasons for it. Where the review is not upheld, the outcome will explain whether the University's internal procedures are complete and whether the student may request a Completion of Procedures letter for referral to the OIA.

10. Preference informed allocation

The preference informed allocation uses a computer-based algorithm. This algorithm gives as many students as possible the preferred choice of LEP whilst maintaining capacity for students with approved pre-allocations. It is closely aligned to the post-graduate Foundation Programmes' preference-informed allocation process.

The random rank allocation process will be run using an auditable method. The School will retain appropriate records of the allocation process, including capacity assumptions, approved pre-allocations, random rank generation and final allocations. Individual students will not normally be provided with other students' information.

Pre-allocations

- Single LEP pre-allocations: Students approved for pre-allocation to a single, specific LEP will be allocated directly to this base hospital.
- Regional pre-allocations: Students approved for pre-allocation to a region (rather than a specific LEP) will be allocated to one of the appropriate LEPs during the first pass of the algorithm.

The allocation process is as follows:

- All students (excluding those with specific LEP pre-allocations) are assigned a random computer-generated rank that is entirely random. This rank determines the order in which allocation decisions are made. The algorithm consists of 2 passes.

First pass: Preferred placement and regional pre-allocation

- The algorithm processes students in rank order.
- If a student's first-choice placement has available capacity and there will be room remaining for students with regional pre-allocations, this student will be allocated to their first choice placement.
- If the first-choice placement is full:
 - If the student has approved regional pre-allocation, this student is allocated to their highest preferred LEP that has space.
 - If the student does not have approved regional pre-allocation the student is skipped for this pass.

Pass 2: Allocation of remaining students

- Again, the algorithm works through the student list in the same rank order.
- Any student not placed in the first pass is allocated to their highest-ranked placement that still has available space.
- This continues until all students have been allocated.

Student-initiated swaps will not normally be permitted. The School will not operate a general swaps process because this may undermine fairness, capacity planning and placement governance. Exceptionally, the School may consider a change where required because of new exceptional circumstances, a reasonable adjustment, safeguarding concern or material administrative error.

If a material technical or administrative error is identified, the School may take reasonable corrective action. Corrective action will be proportionate and will seek to avoid unnecessary disruption to students already allocated.

11. Repeating students

Students who are repeating years in Phase 2, will normally return to their existing LEP. However, students in Phase 1 who are repeating their second year, or students who suspend their studies after passing year 2 are not guaranteed a place at their originally allocated LEP when they return.

12. New circumstances after allocation process

No new pre-allocation requests will be accepted after the allocations have been made. However, late requests could be reviewed if there are new circumstances that arise after the deadline. It may not be possible for any late agreements to be implemented in the same academic year and students may have to defer their studies.

Late requests will only be considered where the circumstances arose after the deadline, or where there is a good reason why the student could not reasonably have disclosed them earlier. The student must submit evidence as soon as reasonably possible.

The School will consider whether the request can be accommodated in the current academic year. Possible outcomes include no change, additional support within the existing allocation, a change of base hospital where feasible, temporary adjustment, interruption or deferral. The School will explain the reasons for the outcome.

13. AKT QE results

Reallocating students after AKT QE results is only considered if these results significantly affect numbers at a particular LEP. This is considered as a continuation of the allocation process.

Reallocation will be informed by the student preference survey data, student rank, and discussion with students who indicated a preference for the affected LEP.

Reallocation after AKT QE results will only be undertaken where necessary for placement capacity, educational quality, patient safety or programme delivery. The School will minimise disruption where reasonably possible and will explain the reason for any reallocation to affected students.

14. Monitoring and Reviewing Results

The School will keep appropriate records of pre-allocation applications, outcomes, appeals or reviews, late requests and any issues arising from implementation.

The operation of this policy will be reviewed annually to identify themes, consistency of decision-making, equality impacts, student feedback, placement capacity issues and any procedural improvements required.

The review will not identify individual students but may be used to improve future guidance, communications, timelines and support arrangements.

15. Confidentiality and use of evidence

Evidence submitted under this policy will be treated confidentially and shared only with staff who need access for the purpose of considering the request, implementing an approved allocation or arranging support. Where information may need to be shared with an LEP or placement provider, the University will normally discuss this with the student first and will share only relevant information.

Students should avoid submitting unnecessary third-party information. Where third-party information is required, it should be limited to what is necessary to evidence the request.

16. Support and advice

Students are encouraged to seek advice before submitting a pre-allocation request, particularly where circumstances are complex or sensitive. Advice may be available from wellbeing Disability Support, Occupational Health, the Students' Union, the Programme Team or other relevant services. Students may request reasonable adjustments to the application process itself.