

eJobPlan

A guide for Managers

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1 Introduction

1.1 About the System

e-JobPlan, part of Allocate Software's HealthMedics Optima, is designed to help facilitate the process of job planning as set out by the national consultant contract, allowing users to populate, review and sign off of job plans all in one place. The system provides organisations with the facility to manage and report on current and historic information at an individual, departmental or organisational level, presenting a valuable opportunity to maximise efficiency through increased transparency.

e-JobPlan provides consistency in the format of job plans, accurate calculations for PAs and on call work including prospective cover, and the ability to reflect the most complex work patterns through the combination of annualised and timetabled activities.

1.2 Who is this guide for?

This guide has been written for manager users of e-JobPlan; primarily those users who have departmental and sign-off manager roles and their administrators. This guide is intended to showcase the primary system features that relate to the creation and management of job plans, it is not intended to be a full system manual. Some organisations may choose to add or remove certain system functionality during the implementation process.

1.3 Obtaining additional help and support

Your Trust will have appointed a Project Manager who will be familiar with the job planning process and the management of the e-JobPlan module, their details can be found at the top of the Support tab.

You can also find various documents in the Support tab which provide further information, including documents on calculations and guidance from the NHS Employers.

1.4 Providing feedback

We would very much appreciate your feedback about the e-JobPlan module whether positive or negative. It is important for us to identify things that work well, but also things that might cause annoyance or frustration. We strive to take all feedback on board and consider any changes that might enhance user experience.

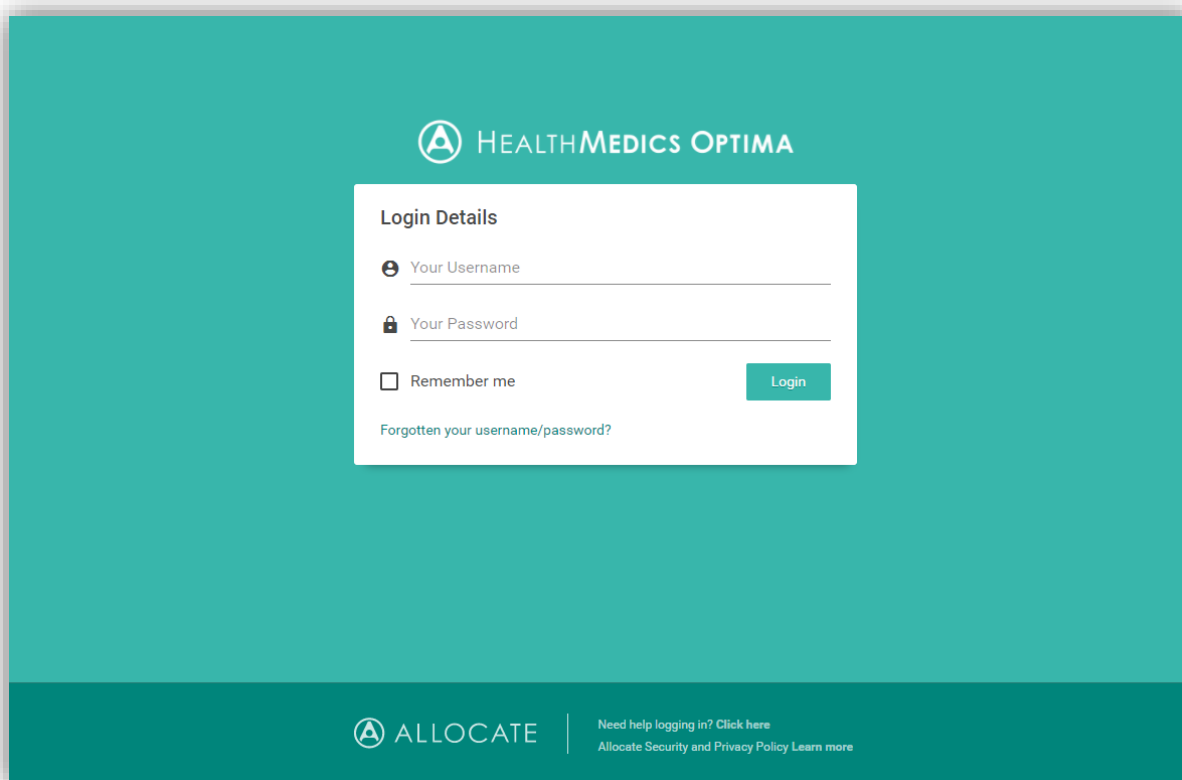
You can provide us with feedback at any time by clicking the Feedback link at the top of every page.

2 Getting started

2.1 Logging in

e-JobPlan is cloud-hosted software that you can access from wherever you have an internet connection. Open a new browser window and navigate to www.healthmedics.allocatehealthsuite.com You may wish to save this address as a favourite bookmark in your internet browser so that you can quickly access it again in the future.

You will have been provided with personalised username and password details in an automated email (contact your Project Manager if these haven't arrived).



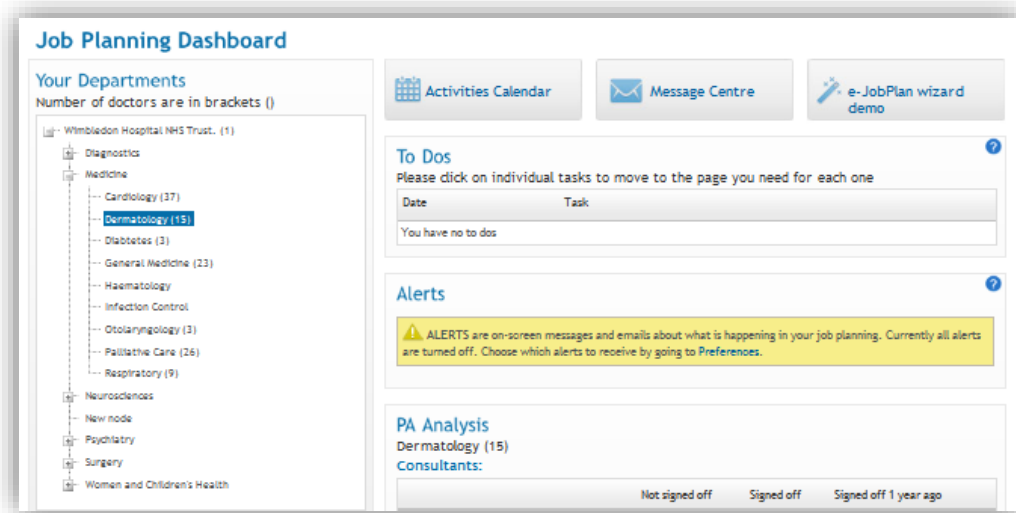
Enter your username and password into the login page which will look similar to the above. If you are logging in for the first time then you will be given a chance to update your personal details as well as being asked to change your password to something more memorable, you will not be able to move on from this page until a new password has been created.

2.2 Forgotten login details

If you cannot locate your details or have forgotten your username and password, the forgotten password link on the login will resend new details once you have confirmed some basic details. If you continue to have problems logging in, you should contact your organisation's Project Manager.

3 Job Planning Dashboard

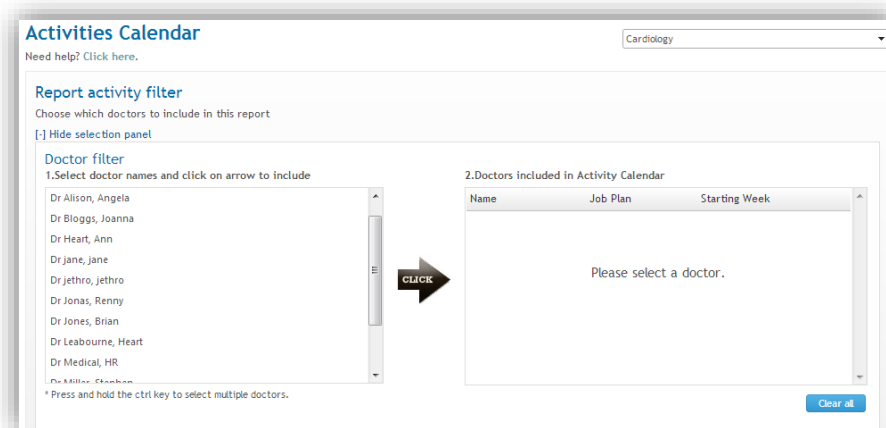
Upon logging in to e-JobPlan, you will be presented with your job planning dashboard. This screen provides summary information for the departments that your role has been assigned. If you manage multiple departments, you can update the information panels by selecting the relevant department from your **department** panel on the left of the screen.



The dashboard also provides access to three useful management tools, the activities calendar, message centre and e-JobPlan wizard demo. These tools are described in the follow sections.

3.1 Activities calendar

The activities calendar is a great way for both doctors and managers to see which activities are being carried out across the department on any given day according to the information in the job plans.



Select the department you are interested in viewing from the options in the drop down menu at the top right of the page. This will prompt the selection panel on the left to populate with the names of all doctors with signed-off job plans across the department. Select the relevant doctors then **CLICK** to include them in the calendar. Where doctors have multi-week routine work cycles, you will be able to select the starting week of the job plan to display in the calendar.

Note: Only signed-off job plans will appear in the activity calendar.

All signed-off job plans for each of the selected doctors will appear on the right-hand side with their relevant start and end dates, if there is more than one job plan for a doctor then you can remove the unwanted version through the **remove** option.

Once the doctors have been chosen, you can specify the type of activities you would like to see from the Report activity filter. Select **update report** to populate the calendar with activities from the chosen job plans, and repeat each time you want to update your filters. Hovering over each activity will display the doctor's name and full details of the activity.

Activity filter

<input checked="" type="checkbox"/> Direct Clinical Care (D)	All activities selected
<input type="checkbox"/> Supporting Professional Activities (S)	0 of 12 activities selected
<input type="checkbox"/> Additional NHS Responsibilities (A)	0 of 13 activities selected
<input type="checkbox"/> External Duties (E)	0 of 9 activities selected
<input type="checkbox"/> Fee Paying Services (F)	0 of 1 activity selected
<input type="checkbox"/> Private Professional Services (P)	0 of 1 activity selected
<input type="checkbox"/> Medical School (M)	0 of 1 activity selected

Activity report

today 18/11/2013 - 24/11/2013 Activity View Doctor View Day Week Timeline

18/11/2013	19/11/2013	20/11/2013	21/11/2013	22/11/2013	23/11/2013	24/11/2013
08:00 - 08:30 Administrative work	08:15 - 13:00 Operating session - Other (please specify)	08:30 - 10:30 MDT other (please specify)	08:30 - 09:00 Administrative work	07:45 - 08:30 Travel time (please specify)		
08:30 - 13:30 Clinical diagnostic work	09:00 - 13:30 Out-patient activities (please specify)	08:30 - 13:00 Clinic - Combined	09:00 - 12:30 Day Hospital	08:30 - 13:00 Operating session - Other (please specify)		
08:30 - 09:00 Administrative work	13:30 - 14:00 Administrative work	08:30 - 13:00 Out-patient activities (please specify)	09:00 - 13:00 Out-patient activities (please specify)	09:00 - 12:30 Specialist clinic (please specify)		
09:00 - 12:00 Specialist clinic (please specify)	13:00 - 17:00 Clinical diagnostic work (please specify)	14:00 - 14:30 Ward round - other (please specify)	09:00 - 10:30 Ward round - other (please specify)	09:00 - 12:30 Clinic - Specialist		
09:00 - 12:00 Clinic - Specialist	14:00 - 16:00 Ward round other (please specify)	14:30 - 17:30 Administrative work	09:00 - 12:30 Clinic - pre-op assessment	09:00 - 11:00 Ward round other (please specify)		
09:00 - 11:00 Ward round - other (please specify)	14:00 - 17:00 Clinic - Combined	16:00 - 18:00 Administrative work	13:00 - 14:00 Administrative work	13:00 - 14:00 MDT other (please specify)		
12:00 - 14:00 Administrative work	14:00 - 17:00 Out-patient activities (please specify)	17:00 - 18:00 Administrative work	14:00 - 16:00 Clinical diagnostic work	13:30 - 16:00 Clinic - Combined		


You can amend the view of the calendar from a Timeline to a Day or Week display, as well as choosing whether to view activities by activity or doctor name by using the options at the top right of the calendar.

3.1.1 Message centre

The message centre provides a trail of all messages sent back and forth between doctors or health professionals and their 1st sign off manager as well as keeping track of any changes which have been made to the job plans, regardless of whether these changes are made by the doctors themselves or their 1st sign off manager. A complete history of these changes and messages can be found by selecting the **read more** button taking you to the full conversation.

Messages & Alerts

Note: You will only be shown recent messages. To see more click the "Show all" button.



Conversation about Dr 116, User's jobplan

Time: 10/07/2012 09:19:21


Dr 116, User wrote:

how many PAs for teaching?

[Read more](#)

Changes to the job plan will be represented by a  and messages will be represented by a 

Conversation about Dr Doctor, Wimbledon's jobplan




Time: 17/01/2011 11:34:33

Dr Doctor, Wimbledon made changes to the job plan.

This is a summary of the PA changes:

- DCC has decreased by 0.13 (0:33 minutes)


Reason for change:
Not specified.



Time: 17/01/2011 11:13:05

Dr Doctor, Wimbledon wrote:

please can you look at my job plan



Time: 16/06/2011 17:05:19

Ms Manager, Project made changes to the job plan.

This is a summary of the PA changes:

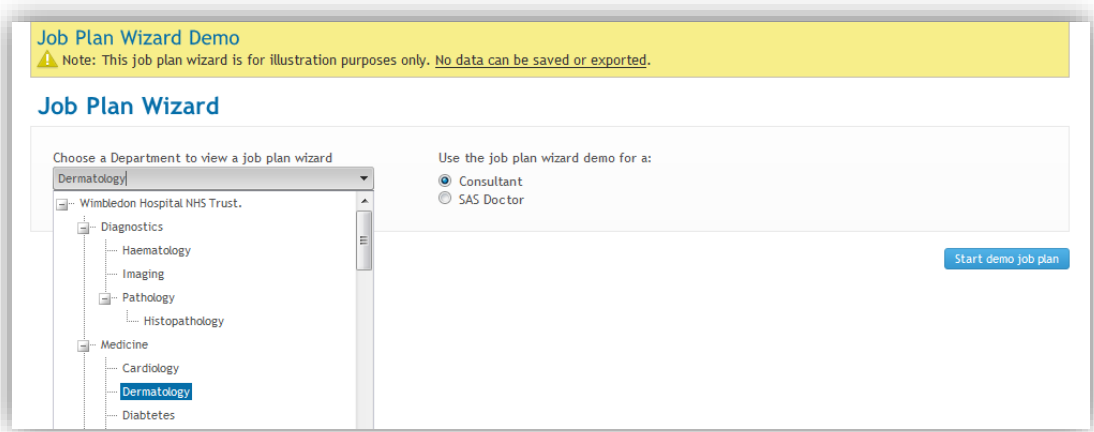
- DCC has increased by 0.04 (0:12 minutes)

Reason for change:
Trust settings were changed. The weeks of year a doctor is available to work is now set to 42.
Comment: Amending settings for training

3.1.2 E-JobPlan Wizard demo

The wizard demo replicates the stages involved in a real job plan in order for you to experiment with different ideas and get yourself familiar with entering data. It is particularly useful if you do not have your own job plan and you want to become familiar with the processes involved.

Note: It is not possible to save, print or export the contents of your wizard demo. If you would like to save an example job plan, contact your Project Manager for information about creating test user access to e-JobPlan.

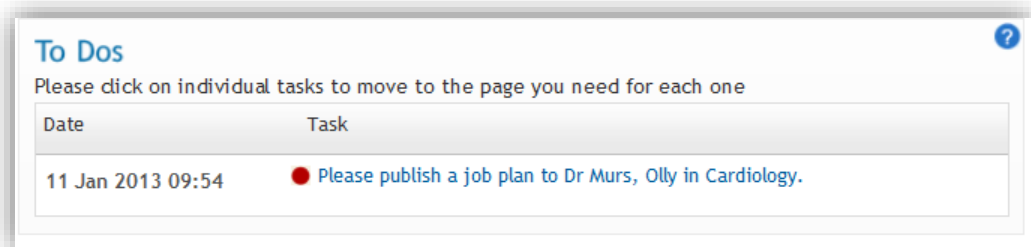


The initial screen will ask you to specify the department for the job plan (this dictates the available activities) as well as the user's role. This is useful if you want to take a look at how a SAS doctor's on-call section differs from that of a regular consultant grade.

Once these have been chosen click **start demo job plan**.

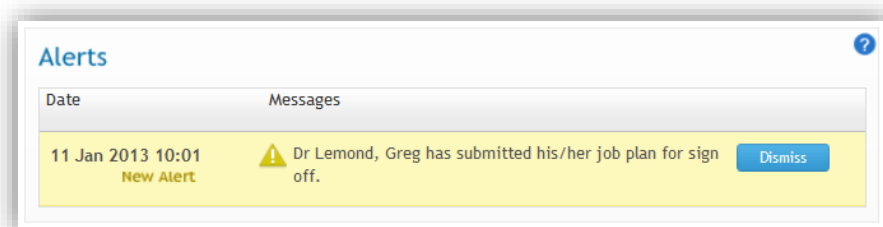
3.1.3 To Dos

If you are required to perform actions in relation to the job plans you manage (for example publishing a job plan to a new doctor) then the task will appear in your to do list. Selecting the notification in blue will take you to the page you need to be on in order to complete the task.

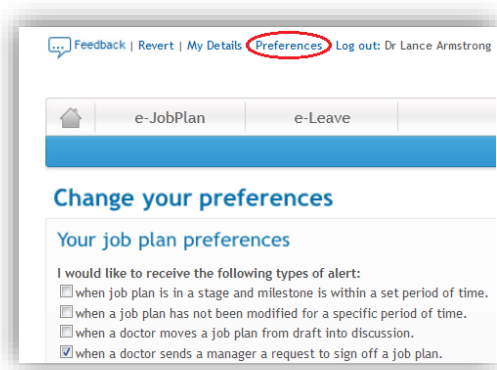


3.1.4 Alerts

Alerts are notifications of changes to job plans across your department. Depending on your notification preferences, you may also receive an equivalent email.

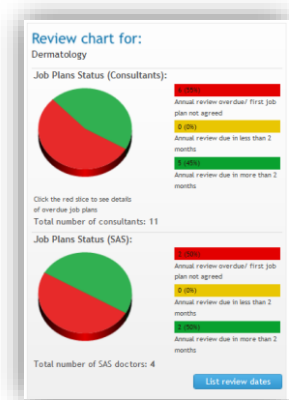


You can choose which actions prompt an alert through the **preferences** tab at the top of the screen.



3.1.5 Review charts

Review charts will display information based on when the review date of the job plans is due, split by consultant and SAS doctor roles. The green portion of the chart represents all the job plans with more than 2 months until their review, those in yellow have less than 2 months and the red area is for those who are overdue or not yet agreed to their 1st job plan.



Selecting the red portion of the chart will produce a breakdown of the stages which each overdue/not yet agreed job plan is currently in.



The **list review dates** button at the bottom of the section will open up a new window with details of each individual's job plan stage and date of review.

Review Dates List
Date of report print-out: 11 Jan 2013

You can order this list by clicking on the column headers. Click again on the same header if you want to change the order from ascending to descending. The names of doctors with job plans outside their 12-month review period are highlighted in red or bold.

Name ▾	Department ▾	1st sign-off manager ▾	Review date ▲	Stage ▾
Dr Hall, Clare (SAS)	Dermatology	Dr Hall, Clare	14 Oct 2014	Signed-off
Dr Johnson, David	Dermatology	Dr Johnson, David	13 Oct 2014	Signed-off
Dr White, Bethy	Dermatology	Dr White, Bethy	2 Nov 2013	In 'Discussion' stage

4 Managing Job Plans

The manage job plans area of e-JobPlan allows you to control the publishing, viewing, editing and signing off of those job plans that you have been assigned responsibility for.

4.1 The job plan stages

e-JobPlan helps to facilitate a job plan moving through a staged life-cycle.

Publish

- Provides doctors with either a new blank job plan or a copy of a previous plan
- Either the project manager (PM) or 1st sign-off manager can be nominated to publish
- Doctor receive an automated email alert (where specified in Trust settings)
- Trust can choose to publish straight into either the draft or discussion stages

Draft (optional, depending on organisation setting)

- Consultant only view of job plan which can be edited as required
- Job plan does not feature on any reports

Discussion

- Job plan visible by consultant and Trust.
- The doctor or 1st sign-off manager can edit the job plan (with any changes visibly recorded)
- Job plan visible in reports from this stage forward
- Either party can request first sign-off

1st Sign-off

- Job plan no longer editable by either party
- Electronic sign-off performed by nominated first sign-off manager
- 1st sign-off manager or consultant can elect to push job plan back to discussion if necessary

2nd Sign-off/3rd Sign-off

- Optional electronic sign-off performed by nominated second sign-off manager
- 2nd/3rd sign-off manager can elect to push job plan back to discussion if necessary

Signed off

- Job plan completed and locked down

Mediation

- Optional stage to be used where either party disagree at first or second sign-off stages
- Allows process to be tracked and relevant documentation to be attached

Lock down stage

Job plan lock down is used by managers to freeze the state of a plan in the case where it will not be finally signed-off but there is a requirement for a new job plan to be published. Previously, lock down was not formally recognised as a stage in the job plan life-cycle which meant that doctors and managers could not easily identify a locked job plan.

A new formal lock down stage has been introduced to e-JobPlan which enhances the visibility and reporting ability for locked down plans. The procedure for locking down a job plan remains unchanged.

Current job plans tab showing job plans in the locked down stage

Mr Corbett, Andrew	01 Jun 2016	Draft (not visible)			
Mr Babel, Arif	PT 01 Apr 2015	Locked down (read-only)	2.656	81%	
Ms Makowski, Magda	01 Apr 2013	Locked down (read-only)	10.297	91%	
Dr Forest, Sheldon	01 Apr 2015	Discussion (read-only)	12.857	84%	

Locked down graphic displayed on the doctor dashboard.

Current Job Plan: ?

This job plan started **01 April 2015**.



 Activities Calendar

Department:	Trauma & Orthopaedics	
<hr/>		
Total PAs to date:	Core	2.656
	Additional Programmed Activities	0.000
	Total =	2.656
<hr/>		
Total hours to date:	Core	10:40
	Additional Programmed Activities	0:00
	Additional To Contract	0:00
	Total =	10:40

4.2 Create job plans

Your organisation will decide during implementation whether Project Managers or Clinical Managers (or both) will be responsible for the creation of new job plans. If you do not have publishing rights for new job plans the create job plans tab as shown below will not display.

The screenshot shows the 'Manage Job Plans' interface. At the top, there is a dropdown menu set to 'Cardiology'. Below it are three tabs: 'Create job plans', 'Current job plans', and 'Job plan library'. The 'Create job plans' tab is active. The interface is divided into two main sections: '1. Select users from the department' and '2. Select desired action'. In the first section, a list of users is shown with checkboxes for selection. The users listed are: Dr 72907, User(Con); Dr 73248, User(Con); Dr 73529, User(Con); Dr 73567, User(Con); Dr 73937, User(Con); Dr 74394, User(Con); Dr 74719, User(SAS); Dr 74810, User(Con); Mr AHP, Igor(AHP); Mr AHP, User 4(AHP); Mr Nurse, User(Nurse); and Miss Nurse, User 2(Nurse). A note at the bottom of the list states: 'The number of users will not match the count because this dept has test users.' In the second section, there are four radio button options: 'Publish last job plan', 'Edit last job plan', 'Edit blank job plan', and 'Publish blank job plan'. A 'Continue' button is located at the bottom right of the interface.

To publish job plans you must first choose the relevant department from the drop down at the top right before choosing the doctors' or health professionals' names.

The list of doctors and health professionals on the left hand side details the stage at which the doctors' or health professionals' current job plans are in. If no status is shown then either their latest job plan is signed-off or they are yet to have a job plan published to them. To select a doctor or health professional, place a tick against their name – it is possible to select multiple users.

The users' roles are also displayed in the list in brackets after their names.

Create job plans **Current job plans** Job plan library

Firstname:

Surname:

There are 14 doctors.

[Search](#)

Name ▶	Start Date ▶	Status ▶	Action ▼	PA ▶	DCC ▶	Msg	Views
Dr 72978, User (Con)	TU 01 Apr 2016	Discussion (editable)	Edit job plan Request sign off	4,923	80%		
Dr 72989, User (Con)	TU 01 Apr 2017	Discussion (editable)	Edit job plan Request sign off	3,697	74%		
Dr 72621, User (Con)	01 Aug 2018	Discussion (read-only)		3,697	74%		
Dr 73529, User (Con)	01 Aug 2018	Discussion (read-only)		3,697	74%		
Dr 74394, User (Con)	01 Aug 2018	Discussion (read-only)		0	0%		
Dr 74719, User (SAS)	01 Aug 2018	Discussion (read-only)		0	0%		
Mr AHP, Igor (AHP)	24 Oct 2019	Discussion (read-only)		100%			
Mr Nurse, User (Nurse)	24 Oct 2019	Discussion (read-only)		67%			
Dr 72504, User (Con)	01 Apr 2017	Locked down (read-only)		4,923	80%		
Dr 72930, User (Con)	01 Apr 2017	Locked down (read-only)		4,923	80%		
Dr 73248, User (Con)	01 Apr 2017	Locked down (read-only)		10,415	86%		
Dr 73567, User (Con)	01 Apr 2017	Locked down (read-only)		3,923	75%		
Dr 73937, User (Con)	01 Apr 2017	Locked down (read-only)		4,098	76%		
Dr 74810, User (Con)	01 Apr 2017	Locked down (read-only)		4,098	76%		

Legend:

Managed by you Not managed by you OC Old Contract PT Part Time CA Clinical Academic
HD Honorary Doctor LD Locum Doctor MD Military Doctor TU Test User

[Click here](#) to view all job plans as a single document. **This report may take a while to generate.**

The available desired actions displayed on the right-hand side of the screen will be tailored to those users selected.

- I. Publish last job plan – for those who have a previous job plan that requires only small changes
- II. Edit last job plan – enables the publisher to make their own amendments to a copy of the previous job plan
- III. Edit blank job plan – enables the publisher to make their own amendments to a new blank job plan
- IV. Publish blank job plan – for those who have no previous job plan or where the post holder’s work has changed substantially

Note: Choosing to publish a new job plan whilst an existing job plan remains open (i.e. not signed off or locked down) will result in the loss of that previous job plan

Having selected the desired publishing action, you’ll need to specify the initial stage and start date of the new job plan and whether a notification email is sent to the doctor or health professional. The provisional start date of the new job plan will default to be a year after the doctor’s or health professional’s previous plan if it exists.

Use the **edit multiple records** button to edit the details for a group of doctors.

Note:
Please untick any doctors that you do not wish to send an email to notifying them of their new job plan.
The previously signed off job plan will be updated to have an end date one day before a selected provisional start date.

[Edit multiple records](#)

Doctor	Existing Job Plan	Place Into	Provisional Start Date	<input checked="" type="checkbox"/> Send Email
Dr 54165, User		Discussion	09 August 2017	<input checked="" type="checkbox"/>
Dr 54246, User		Discussion	14 December 2016	<input checked="" type="checkbox"/>
Dr 54272, User		Discussion	01 April 2015	<input checked="" type="checkbox"/>

Lock down job plans that are in development [Publish](#)

4.2.1 Ability to lock down job plans at publish stage

Managers could lock down multiple job plans at the same time during the process of publishing a new job plan.

Having selected doctors to publish new job plans to and the desired action (e.g. publish last job plan), you will be presented with the list of doctors and health professionals and the opportunity to adjust the initial job plan stage and the job plan start date. This screen now presents the additional option of being able to lock down any existing job plans in development; selecting this option automatically locks all open job plans for the specified users, preventing them from being overwritten by the new job plan.

Doctor	Existing Job Plan	Place Into	Provisional Start Date	<input checked="" type="checkbox"/> Send Email
Mr Akpan, Adil	In Draft	Draft	01 April 2017	<input checked="" type="checkbox"/>
Mr Class, Master	In Draft	Draft	07 February 2017	<input checked="" type="checkbox"/>
Mr Corbett, Andrew	In Draft	Draft	01 June 2017	<input checked="" type="checkbox"/>
Mr Earnshaw, Brian	In Draft	Draft	01 June 2017	<input checked="" type="checkbox"/>
Mr Browne, Jack (SAS)	In Draft	Draft	01 April 2017	<input checked="" type="checkbox"/>
Mr Bilgin, Zeki	In Draft	Draft	01 April 2017	<input checked="" type="checkbox"/>

Lock down job plans that are in development [Publish](#)

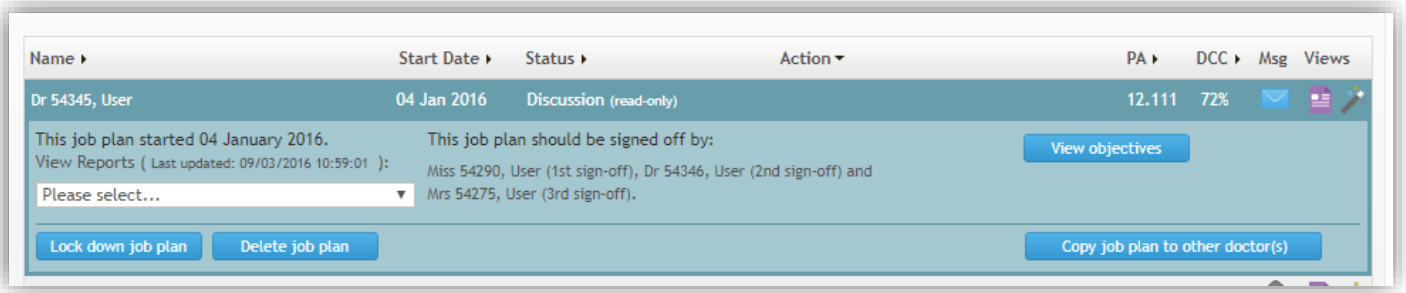
4.3 Current job plans

The current job plans tab displays all the current job plans for individuals across the selected department; including the doctors' or health professionals' name, job plan start date, job plan status and available actions. The right hand side also shows details of the job plan's PA total and DCC percentage as well as a link to the associated messages and alerts. The available actions for each job plan listed on this screen will depend on your user rights as defined by your organisations nominated project manager.

The job plan start date and status are visible as a column on the current job plans tab.

Name	Start Date	Status	Action	PA	DCC	Msg	Views
Dr 72978, User (Con)	TU 01 Apr 2016	Discussion (editable)	Edit job plan Request sign off	4.923	80%		
Dr 72989, User (Con)	TU 01 Apr 2017	Discussion (editable)	Edit job plan Request sign off	3.697	74%		
Dr 72621, User (Con)	01 Aug 2018	Discussion (read-only)		3.697	74%		

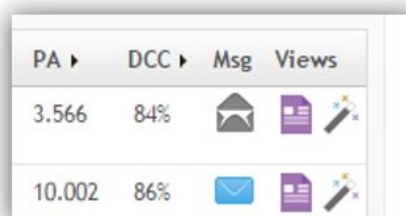
Select a doctor's or health professionals' name to view the available actions.



The manage job plan actions are listed below:

- I. View printable job plan – use this to view and print a summary of the job plan.
- II. View objectives – use this to view and print a summary of the doctor’s personal objectives.
- III. Request sign off – used to confirm your agreement with the job plan and request that the doctor or the health professional accepts this plan.
- IV. Cancel request – use this to cancel a previous request for the doctor to sign off a job plan if further changes to the plan are required.
- V. Sign off – use this to confirm your agreement with the job plan following the doctor or the health professional making their request for your approval. The job plan will move to the next lifecycle stage.
- VI. Edit job plan – use this to make changes to the doctor’s or the health professionals’ job plan when you are their first sign off manager and the job plan is in the discussion stage.
- VII. Enter mediation – use this to move the job plan into the mediation and appeals stage when a job plan is disputed by either party.
- VIII. Copy job plan to other doctor(s) or health professional(s) – use this to copy the job plan in its current form to another doctor in the organisation. When selected, you will be taken to the create job plans tab where you can specify the user you wish to copy the plan to. You can copy job plans only to users with same role.
- IX. Lock down job plan – use this to freeze the current state of the job plan where sign off is no longer possible. A new job plan can now be published without overwriting the locked down plan.

It is possible for all levels of manager to see job plans using the wizard view as long as they would otherwise have had access to the printable version of the job plan. On both the current job plans and job plan library tabs, new printable job plan (document icon) and wizard view (wand icon) links are shown.



4.4 Mediation and appeals

1st sign off managers and project managers can enter a job plan into mediation via the **enter mediation** button to the bottom left of the blue box against a doctor. Details of the mediation can be documented and saved in this form to provide an audit trail, including comments from either party, supporting documents and the meeting date.

Job Plan Mediation & Appeals

Note: For further guidance please refer to the help manual or contact your manager

Stage	Date
No records to display.	

Save Cancel

This is the job plan for Dr SAS O&G and is currently in 'Mediation' stage.

Mediation Details

Bringer of Action Doctor Clinical Manager

Reason Dispute JP

Reason Comments

Meeting Date 11 Jan 2013

Once mediation details have been entered and saved it is possible to move the job plan into the appeal stage or back to discussion. Once in Appeal further information can be added and edited at any time, once the dispute has been resolved the job plan can be put back into Discussion; whilst in mediation or appeal the job plan cannot be edited.

4.5 Job plan library

The job plan library contains all the historic job plans for each doctor. The number in square brackets after a doctor's name identifies the number of historic plans for that doctor. Select the date of a job plan to view addition detail and options.

Create job plans Manage job plans Job plan library

Firstname:

Surname:

There are 13 doctors.

Search

Name	Status	Period	JP View	PA	DCC	Msg
Dr Depp, Johnny (SAS)	Signed-off (read-only)	01 Jul 2012 --> ongoing	View printable job plan	8.65	89%	
Dr Hall, Clare (SAS) [3]	Discussion (read-only)	14 Oct 2013 --> ongoing	View printable job plan	13.22	86%	
View Reports (Last updated: 13/07/2012 15:49:03): This job plan was signed off by: View objectives						
Original compared to current <input type="text"/> Dr Hall, Clare (1st sign-off), Dr Manager, Clinical (2nd sign-off) and you (3rd sign-off).						
Copy job plan to other doctor(s)						
	Discussion (read-only)	14 Oct 2012 --> 13 Oct 2013	View printable job plan	0	0%	
	Signed-off (read-only)	14 Oct 2011 --> 13 Oct 2012	View printable job plan	2.57	68%	

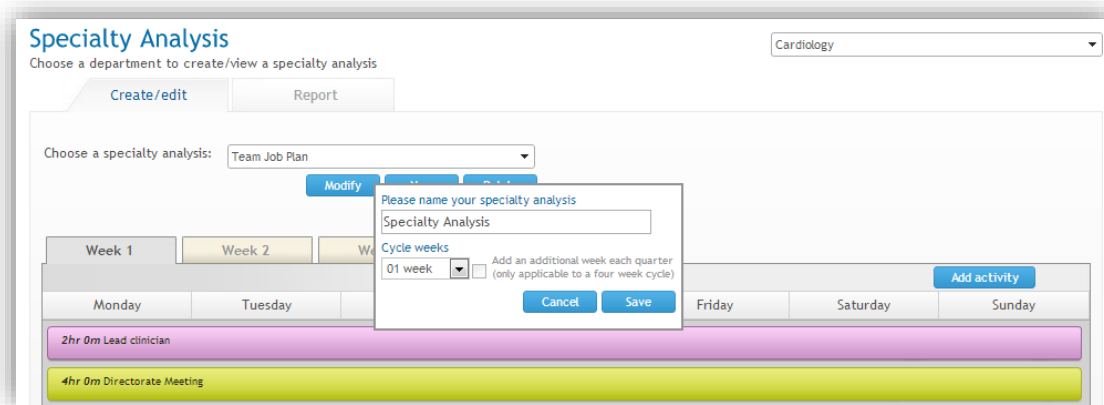
5 Specialty Analysis

The specialty analysis tool is available from the main navigation bar. Specialty analysis allows you to identify your current or future specialty coverage requirements and compare these against the activities currently provided by the job plans in that specialty.

5.1 Creating a new specialty analysis plan

To start creating a new plan, select the relevant department from the drop down menu at the top left of the screen and then click **new**. In the resulting pop-up window, choose a descriptive name for your new plan and select the number of weeks you wish for it to cycle over. Click **save** after making your selections.

Note: Individual departments can have multiple specialty analysis plans saved against them



Having saved your new plan, the weekly timetable grid will display with a tab for each of the weeks in your cycle. The timetable grid enables you to enter the required activities for each day of the week. Activities can either be directly entered onto the grid, or by using the **add activity** window just above the day columns.

As with the routine work section of individual job plans, the activity grid is able to support three types of activity.

- I. Activities with no specified day – these are flexible activities that need to occur at some point in the week but can be fitted around other commitments as necessary. Add these activities directly to the grid by hovering the mouse pointer over the 1st row of the grid below the days of the week and select **add activity with no specified day**.
- II. Activities with duration only – these are activities that occur on a specified day but have flexibility about when they can be delivered. You will be required to specify their length of the activity in hours. Add these activities directly to the grid by hovering the mouse pointer over the 2nd row of the grid below the days of the week and select **add duration activity**.
- III. Timetabled activities – these are activities that occur on a specified day and at a specified time with no flexibility on when they can be delivered. You will be required to specify the day and start and finish time for each of these activities. Add these activities directly to the grid by hovering the mouse pointer over the 3rd row of the grid below the days of the week and select **add timetabled activity**.

Selecting the option that you require displays the add activity panel which will default to the relevant settings. From here you will need to choose the day (if required), as well as the activity details.

Note: Available activities are defined in the department settings for the DCC category and at organisation level for all other categories

Depending on the type of activity you can then specify either start and end times (for timetabled activities) or duration (for no specified day and duration activities). There is also a chance to amend the display name of the activity (you may wish to abbreviate the name for display purposes) and to enter details of the room or theatre location if applicable.

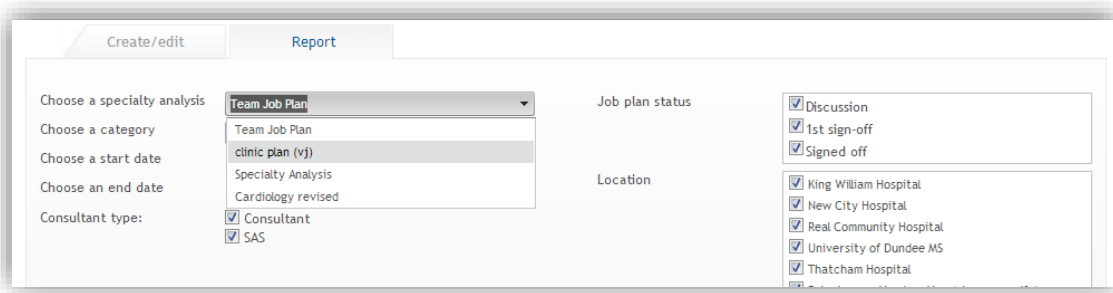
Select **add** to save your activity details and display it on the grid. No specified day activities will span across the entire week, whilst those with by duration or time will show on their relevant days.

Hover your mouse pointer over the activity to show the activity detail and the option to delete that activity.

5.2 Specialty analysis reporting

To start comparing your plan with the job plans in your selected department, click the **report** tab within the specialty analysis screen.

Select the plan you wish to analyse by using the **choose specialty analysis** drop down menu.

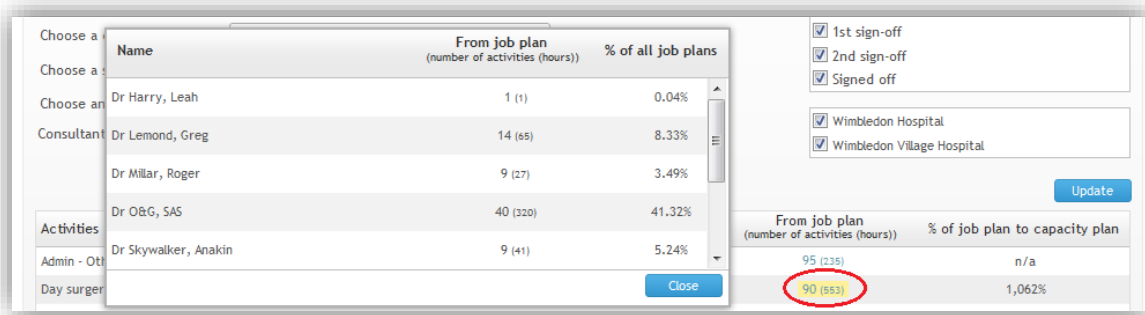


You can choose to look at all categories, as well as having the option to specific a particular category such as DCC. The start and end date selectors enable you to specify the length of time you wish to report on; this will have an impact on the number of activities shown in the report. Choose the status of the job plans you wish to include in the report and define the locations if necessary. Click **update** to run the report based on your selections.

The resultant report will display below the filter options. The following columns are described below:

- I. Activities – a list of all activities based on the categories selected in the filter
- II. From specialty requirements – the number of each activity as defined in the specialty plan and the total hours this equates to in brackets
- III. From job plan – the number of each activity as defined in the job plans for this department and the total hours this equates to in brackets
- IV. % of job plan to specialty requirements – comparison of the planned activity versus the delivered job plan activity expressed as a percentage (under-delivery will result in a figure below 100%, whilst over-delivery will result in a figure above 100%)

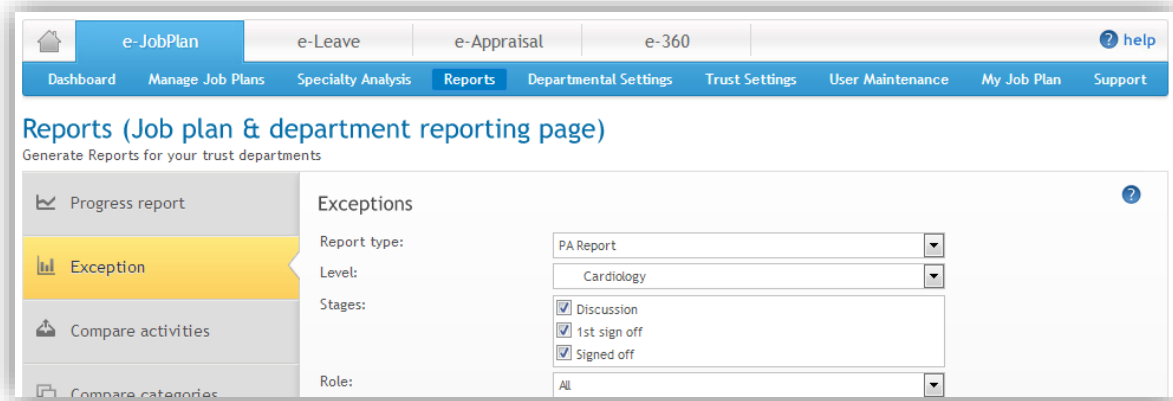
To find a breakdown of the activity information for each individual activity by doctor select the figure in the ‘from job plan column’. The resulting pop-up window shows all the doctors undertaking this activity and their contribution, as well as the equity percentage split between each of them.



Export the report data into CSV format by selecting **export to CSV** at the foot of the page.

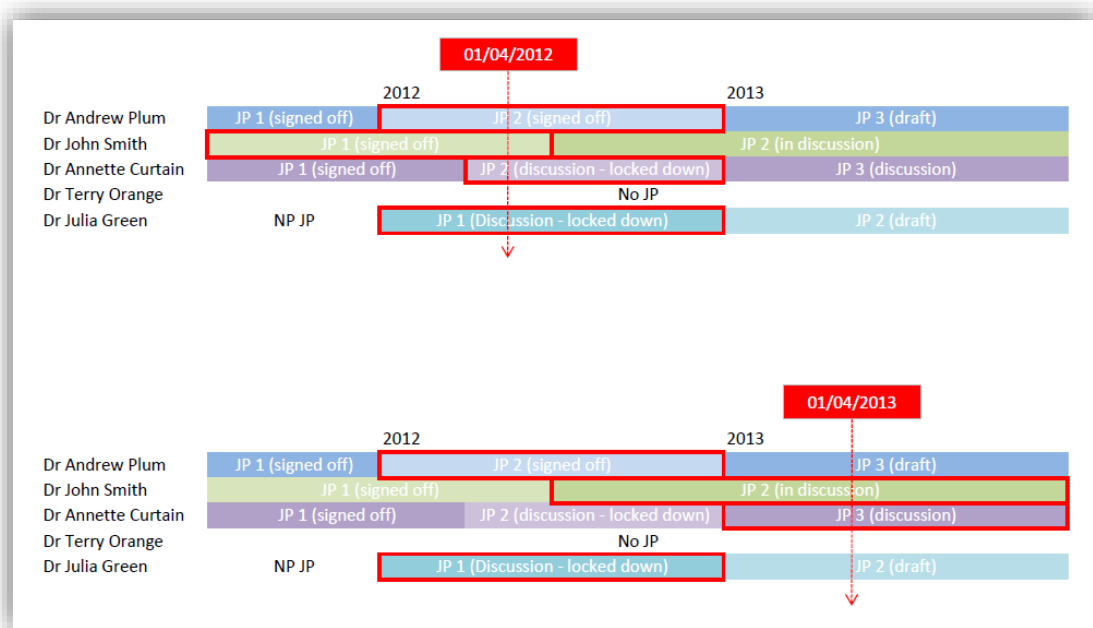
6 Reports

Reports are available to all managers at either organisation or departmental level depending on the role of that manager. To view the report options, select **reports** from the main system navigation at the top of the screen. The available reports are listed in vertical tabs to the left of the screen.



6.1 Filtering reports by date

With the exception of the progress and annualised reports, all other reports allow the manager to filter the contents by a single date. The single picker enables managers to filter the report by job plans that spanned that point in time. By way of illustration, the two following diagrams show five doctors, each with differing start and end dates to their job plans and each with job plans at different stages. Those job plans highlighted in red indicate those that will be shown in the reports by selecting either of the example dates.



Job plans used in the report will include all of the latest activities in the plan, irrespective of the date that those activities were added. Doctors with either no job plan or a draft plan only will not appear on the report.

6.2 Other report filters

In addition to the date picker discussed in the previous section, all reports (with the exception of the progress report) allow data to be filtered by a common set of criteria.

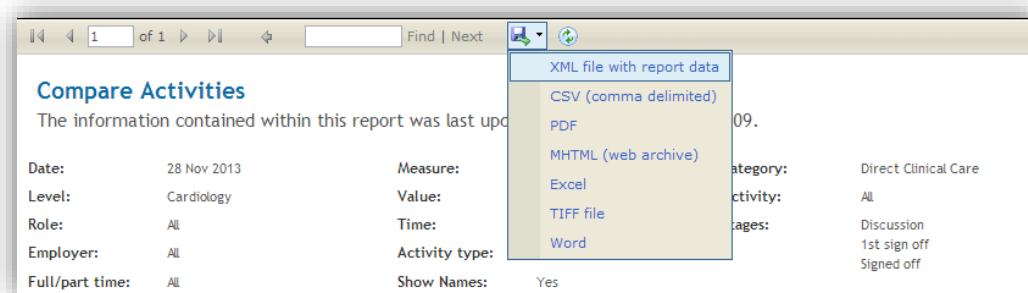
- I. Level - allows for the selection of an individual department or directorate. Select the organisation name at the root of the structure to generate data for all users. Level selection is based on the role of the manager,
- II. Stages – enables the inclusion of job plans at either the discussion, 1st sign-off or signed off stages of the life cycle. Note that none of the reports allow the inclusion of data from job plans in draft.
- III. Role – filters the clinical users by those with either regular consultant positions or those with a SAS role.
- IV. Employer – filters the activities used in the report by either those for the employing organisation or those for an alternate employer.
- V. Full/part time - reflects the appointment type of the doctor as specified in their job plan
- VI. Core/APA/ATC – enables the filtering of these activity categories; Core, Additional Programmed Activity or Additional to Contract.
- VII. Measure – enables the report values to be displayed in either an hourly or PA measure.
- VIII. Time - allows the filtering of activities that take place during either normal or premium time, or both.
- IX. Activity Type - allows the filtering of timetabled or non-timetabled activities or both. Timetabled activities are those with fixed start and end times, whilst non-timetabled are those that are flexible and only have a set duration.
- X. Show names – enables the creation of anonymous reports if necessary

Managers can choose whether to show the chosen filters at the top of each report by select the tick box below the filters marked **include filters in the report**.

6.3 Exporting reports

With the exception of the exception and export to excel reports, all report views contain a common report control bar at the top of the screen.

The report control bar enables users to navigate through multiple report pages by using the left and right navigation arrows to the left of the bar. The control bar also contains the export icon that enables manages to push data into a variety of formats.



Select the blue floppy disk export icon (shown above) to display file type options. Your internet browser will usually prompt you to either open or save a copy of the report in that format.

6.4 Report types

The various available reports are described below:

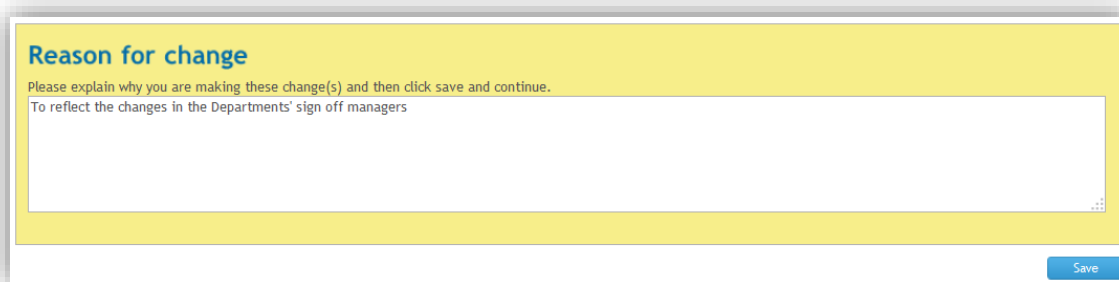
- I. **Progress report** – this day-to-day management report allows managers to stay aware of the progress each doctor’s job plan makes through the job plan lifecycle. The report highlights recent activity against each job plan, and enables the manager to identify any organisational bottlenecks in the sign-off process.
- II. **Exceptions** – this report is split into two report types, PA report and Old Contract report (some organisations may also have customised reports saved here too). The commonly used PA report allows managers to identify job plans which exceed a defined PA value – for example job plans whose total PA values exceed 10. Exception reports always display below the report filters on this screen rather than a separate report window.
- III. **Compare activities** – enables managers to compare individual activities within a single category (i.e. DCC or SPA). The resultant report lists all those doctors whose job plans contain the selected activities and the hours or PA value for each.
- IV. **Compare categories** – enables managers to compare whole activity categories. For example, some managers may wish to compare the split of PAs between total DCC and total SPA activities. The resultant report lists all those doctors whose job plans contain activities within the selected categories and the hours or PA value for each.
- V. **Compare locations** – enables managers to compare the work done at each location filtered by activity category.
- VI. **On-call reports** – Two On-call reports are available: On-call summary and the On-call rota detail report. On-call summary lists the on-call commitments for each doctor as reflected in the job plan’s on-call step. For each doctor, the report lists their on-call frequency (split by weekday and weekend), availability supplement and call out category along with the associated PA values. The On-call rota detail report groups detailed information by individual rota name, thus allowing managers to easily compare all doctors from a single rota. The report filters enable managers to select from any number of the available rota names – note that there is no departmental filter for this report.
- VII. **Annualised** – enables managers to generate data on the number of delivered activities over a quarterly or yearly period. Note that the report displays the data by the number of delivered activities rather than by a PA or time based measure. Differences in the way job plan activity can be entered into the job plan can sometimes result in variances between each doctor.
- VIII. **Objectives** – lists by doctor those activities that have and haven’t been linked to a job plan personal objective.
- IX. **Export to Excel** – enables managers to dump all job plan summary data by activity into a single Excel sheet that can then be manually edited and filtered.

7 Departmental settings

Departmental Settings is the area within which all localised settings are determined for each job planning department. Although this area is accessible to view by all managers for their relevant departments, only those with a project manager role are able to make amendments.

Department settings are split into five areas that appear as tabs across the screen: general settings, service objectives, direct clinical care, sign off and changes report.

Changes to either departmental or Trust settings will require a free text explanation that is saved in a changes report providing managers with an audit trail. Make any relevant notes and click **save**.



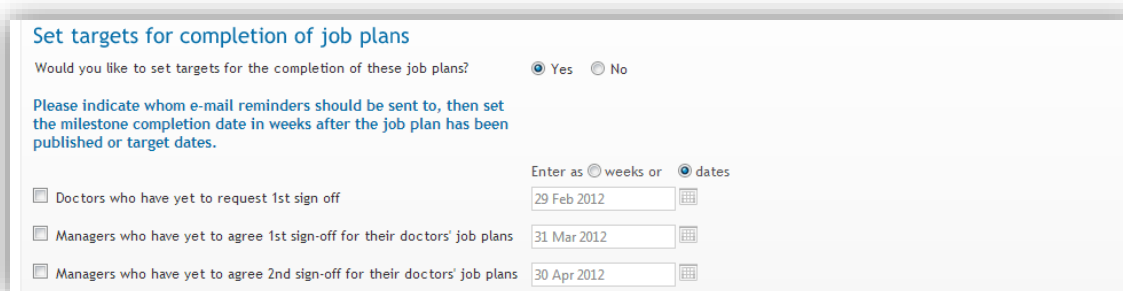
Note: Ensure the correct department has been chosen from the drop down menu – if you have selected an area higher than department level then no information will appear

7.1 General settings

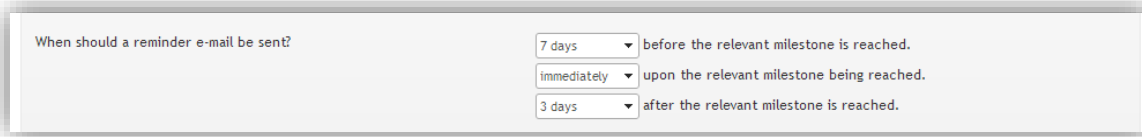
Targets for completion of job plans

It is possible to set targets for both managers and doctors in relation to the completion of job plans. Select **yes** to display the email reminder options for each sign-off level.

For each role (doctors, 1st level sign-off managers and 2nd level sign-off managers) you are able to specify either a fixed date or a set number of weeks after the job plan has been published for automated email reminders to be sent.



You are also able to choose when email reminders are sent in relation to the sign-off milestones you have now set and before, on and after intervals.

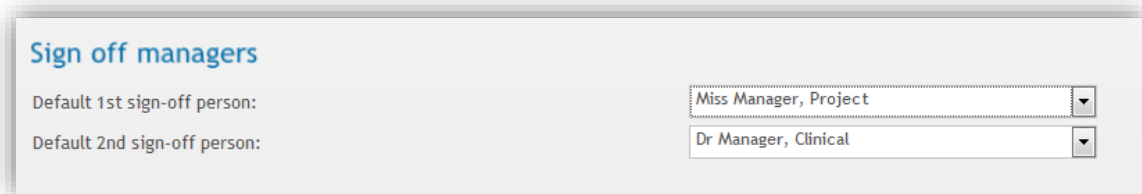


When should a reminder e-mail be sent?

7 days	before the relevant milestone is reached.
Immediately	upon the relevant milestone being reached.
3 days	after the relevant milestone is reached.

Sign-off managers

The sign-off managers section allows the manager to select the default sign-off manager name for each sign-off level. The available names listed are for those users that have a manager role for this specific department.



Sign off managers

Default 1st sign-off person: Miss Manager, Project

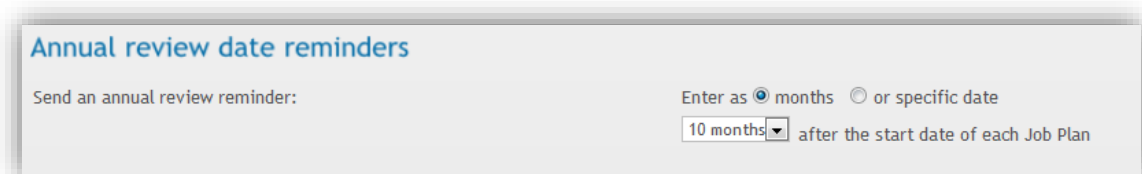
Default 2nd sign-off person: Dr Manager, Clinical

Note: The default sign-off managers apply to newly added doctors. Changes to the default sign-off managers do not result in a change to existing doctors who already have nominated sign-off managers. Use the 'Sign off' tab within department settings to control individual doctor sign-off managers.

Note: Changes to e-JobPlan user roles must be completed by Allocate Software's HealthMedics Support Team.

Annual review date reminders

Setting an annual review date will generate an automated email for each doctor reminding them to review their job plan in time for the next round of job planning. Annual review dates can be either defined as a specific date or between 3 and 11 months after the start date of each job plan. Use the manager dashboard (described earlier in this guide) to report on annual review dates.



Annual review date reminders

Send an annual review reminder: Enter as months or specific date

10 months after the start date of each Job Plan

Department locations

The organisation's available locations are entered in the Trust settings area. Place a tick against those locations that are applicable to this department to avoid unnecessary locations being used by doctors or health professionals when completing their job plans.

Department locations

Please tick all locations that doctors and health professionals in this department work at:

- Select All
- First
- Loc 2235 - currently in use
- Loc 2236
- Loc 2237
- Loc 2238
- Loc 2239
- Loc 2240
- Loc 2241
- Loc 2242
- Loc 2243

7.2 Service objectives

The service objectives tab allows managers to create and edit objectives applicable to doctors and health professionals in this department only. In addition, you can click to view the Trust level objectives to ensure that there is alignment throughout the organisation.

New objectives are defined by **create objective** button. Enter both an objective title and full description.

Edit objective title:

characters remaining 80

Edit objective content:

characters remaining 7000

Board objective to link to:

No linked objective

Linkable programmed activities:

Clinical Non-Clinical

Set objectives for:

Consultants SAS

Nurse AHP

Pharmacist

Save **Cancel**

The additional options on the right hand side allow for any of the current Trust objectives to be linked to the new service objective. You may also wish to limit use of the objective to either clinical or non-clinical activities as well as consultants, SAS doctors, AHPs, nurses or pharmacists. Once all the details have been entered, select **save** to create the objective.

Trust objective to link to:

No linked objective

Linkable programmed activities:

Clinical Non-Clinical

Set objectives for:

Consultants SAS

Nurse AHP

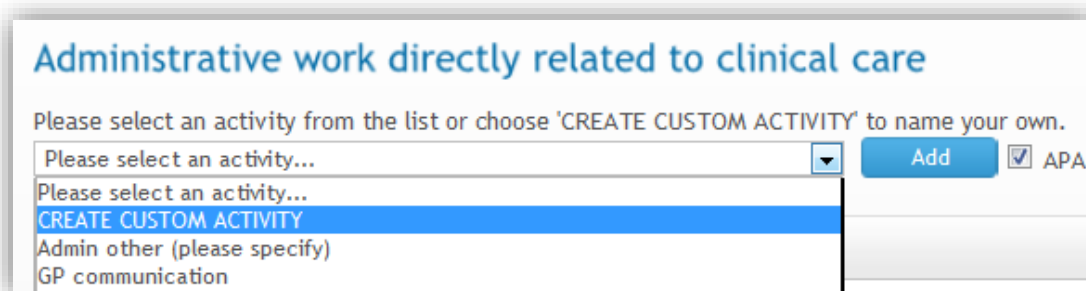
Pharmacist

7.3 Direct clinical care

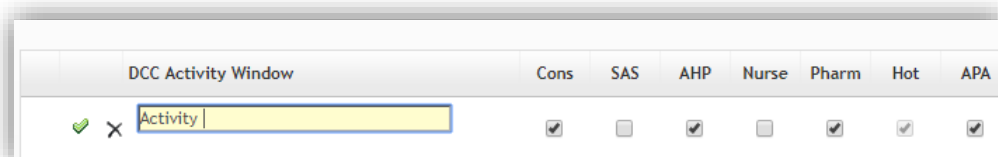
Direct clinical care (DCC) activity language is set at individual department level and is only available for use by doctors and health professionals in that department.

DCC activities are split into 9 fixed activity groupings including clinical diagnostic work, ward rounds etc. The fixed activity groupings enable the organisation to compile benchmark reporting regardless of the specific activity names.

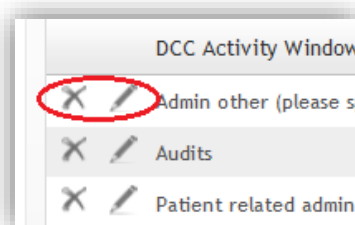
When adding new activities you may either choose a default from the available list or select **CREATE CUSTOM ACTIVITY** from the drop down menu underneath each activity grouping, then click **add**.



To create your own activity enter the name in the yellow box and if you would like to limit its use to core activities only then you can deselect the **APA** (additional programmed activity) option on the right. Once you have entered the details, select the green tick to add the new activity.



Once activities have been added they can either be deleted or edited using the options available on the left.

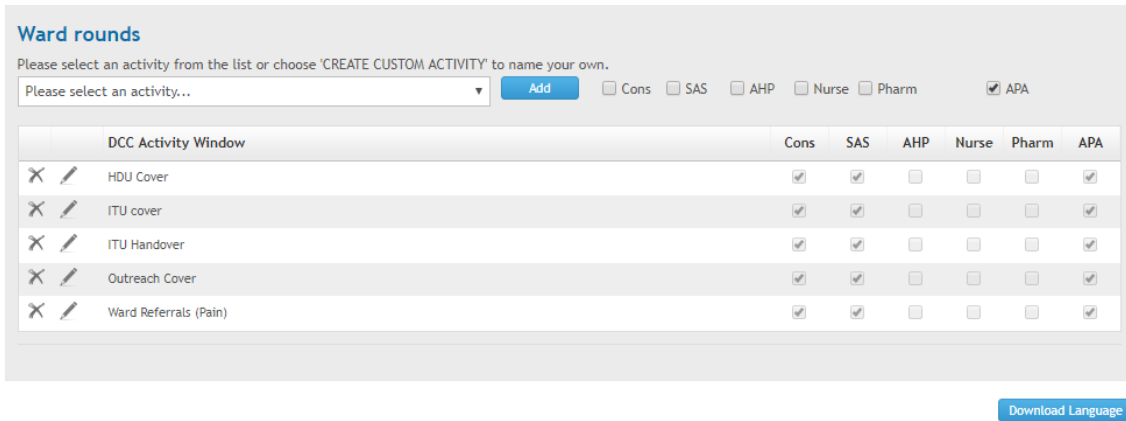


Note: If activities are amended then the relevant changes will transfer into live job plans, however, activities cannot be deleted if they are being used in live job plans. Unwanted activities can only be deleted if all job plans in that department using the activity have been locked or signed-off. Deleted activities will continue to appear in Trust reporting if they apply to the date period selected in the report filters.

7.3.1 Ability to export all activity language

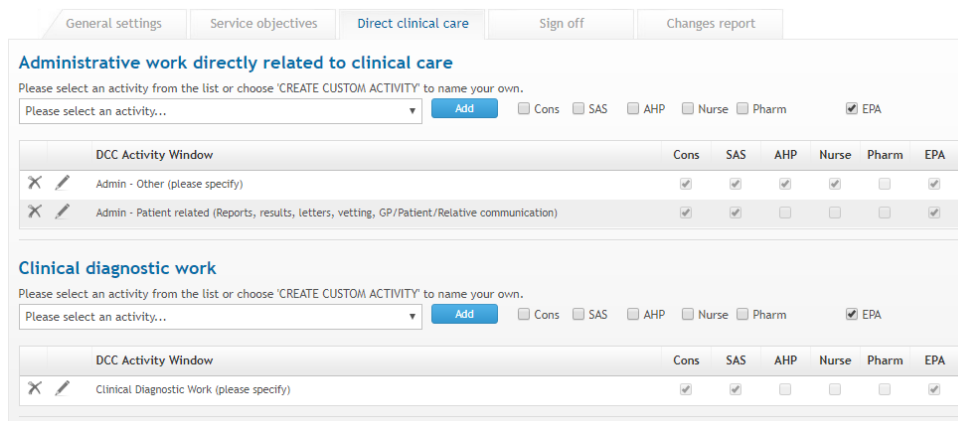
It is possible for managers to export all activity language into a single CSV file. This is particularly useful when needing to review language between job planning rounds. All language pages (at both Trust and department level) now contain a 'Download Language' button. The resulting CSV file always displays all clinical and non-clinical language for the whole Trust, regardless of which screen it is downloaded from.

Download Language button on all clinical and non-clinical language screens



7.3.2 Ability to the visibility of the activity language

With the introduction of the new roles, changes have been made in the Direct Clinical Care section in Department settings, providing managers better control of the visibility of clinical language for each of the clinical roles. Visibility checkboxes are added to the activities which can be set for each role so the users with certain roles can see only the activities that are checked against their roles. On the figure below the visibility checkboxes for the DCC activities are shown.



7.4 Sign-off

Each doctor within a department can have their sign off managers amended individually via the sign off tab. Select **edit** to make and changes, and then click **save** when finished. Newly added doctors or health professionals will retain the department default sign-offs until amended on this screen.

General settings		Service objectives		Direct clinical care		Sign off		Changes report	
									Edit
Name	1st Sign Off	2nd Sign Off	3rd Sign Off						
Dr Brown, Moses (SAS)	Miss Manager, Project	Dr Manager, Clinical	Dr Armstrong, Lance						
Dr Doctor, Specialty (SAS)	Miss Manager, Project	Dr Manager, Clinical	Dr Armstrong, Lance						

7.4.1 Sign-off level report

To aide managers in ensuring that sign-off manager names are kept up to date across the organisation, a new sign-off level report is available from the sign-off tab within department settings. The sign-off level report exports all sign-off across the Trust in to a single Excel sheet, listing the name of every sign-off manager for every doctor or health professional.

The report can be downloaded from the sign-off tab of any department, by selecting the button labelled **download sign-off levels** at the foot of the screen.

General settings		Service objectives		Direct clinical care		Sign off		Changes report	
									Edit
Name	Role	1st Sign Off	2nd Sign Off	3rd Sign Off					
Dr 72504, User	Consultant	Dr 73999, User	Dr 73999, User	Dr 73999, User					
Dr 72621, User	Consultant	Dr 73999, User	Dr 73999, User	Dr 73999, User					
Dr 72930, User	Consultant	Dr 73999, User	Dr 73999, User	Dr 73999, User					
Dr 72978, User	Consultant	Mrs 74058, User	Dr 73999, User	Mrs 74058, User					
Dr 72989, User	Consultant	Mrs 74058, User	Dr 73999, User	Mrs 74058, User					
Dr 73248, User	Consultant	Dr 73999, User	Dr 73999, User	Dr 73999, User					
Dr 73529, User	Consultant	Dr 73999, User	Dr 73999, User	Dr 73999, User					
Dr 73567, User	Consultant	Dr 73999, User	Dr 73999, User	Dr 73999, User					
Dr 73937, User	Consultant	Dr 73999, User	Dr 73999, User	Dr 73999, User					
Dr 74394, User	Consultant	Dr 73999, User	Dr 73999, User	Dr 73999, User					
Dr 74719, User	SAS Doctor	Dr 73999, User	Dr 73999, User	Dr 73999, User					
Dr 74810, User	Consultant	Dr 73999, User	Dr 73999, User	Dr 73999, User					
Mr AHP, Igor	Allied Health Professional	Mr Manager, User	Mr Manager, User	Mr Manager, User					
Mr AHP, User 4	Allied Health Professional	Mr Manager, User	Dr 73999, User	Mrs 74058, User					
Mr Nurse, User	Nurse	Mr Manager, User	Mr Manager, User	Mr Manager, User					
Miss Nurse, User 2	Nurse	Mr Manager, User	Dr 73999, User	Mrs 74058, User					

[Download Sign-off Levels](#)

7.5 Changes report

The changes report keeps an audit trail of all changes made within the departmental settings. The report contains the details of those who made the changes, when they were made and the reason if given.

Settings changes for: Respiratory

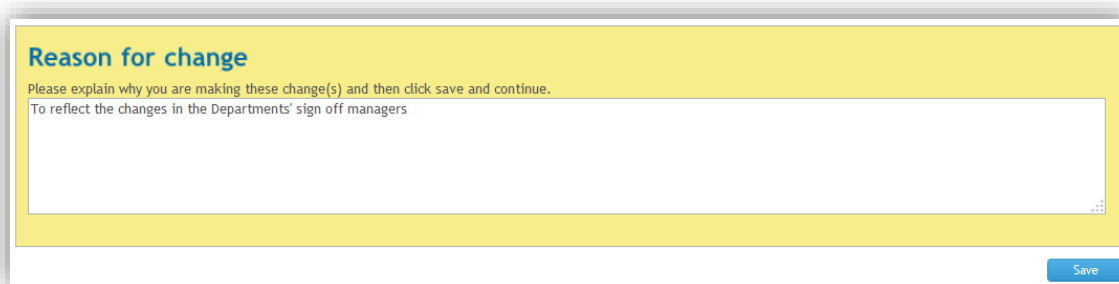
Departmental Setting ▶	Date of change ▲	Who made the changes? ▶	Change from ▶	Changed to ▶	Reason for change ▶
Direct Clinical Care - Unpredictable Emergency Work - Unpredictable Emergency Work - APA	15 Jan 2013 10:59	System	No	Yes	Number of sign off levels changed.
Direct Clinical Care - SAS Doctor Shift Work - Shift On Junior Doctor Rota - APA	15 Jan 2013 10:59	System	No	Yes	Number of sign off levels changed.
Direct Clinical Care - Predictable Emergency Work - Predictable Emergency Work - APA	15 Jan 2013 10:59	System	No	Yes	Number of sign off levels changed.
Direct Clinical Care - Unpredictable Emergency Work	30 Jul 2012 17:31	System	[Added]	Unpredictable Emergency Work	Number of sign off levels changed.
Direct Clinical Care - Predictable Emergency Work	30 Jul 2012 17:31	System	[Added]	Predictable Emergency Work	Number of sign off levels changed.
Direct Clinical Care - SAS Doctor Shift Work	30 Jul 2012 17:18	System	[Added]	Shift On Junior Doctor Rota	Number of sign off levels changed.
Direct Clinical Care - Ward rounds - Standard ward round - APA	18 Jul 2012 15:26	System	No	Yes	Number of sign off levels changed.

8 Trust Settings

The Trust settings follow much the same format as departmental settings, except these are applicable across the entire organisation. Although this area is accessible to view by all managers, only those with a project manager role are able to make amendments.

Department settings are split into six areas that appear as tabs across the screen: general settings, objectives, non-clinical activities, locations, status reports and changes report.

Changes to either departmental or Trust settings will require a free text explanation that is saved in a changes report providing managers with an audit trail. Make any relevant notes and click **save**.



8.1 General settings

General Settings

- i. **Allow “test users” to be included in reports and summary data** – enables the project manager to choose whether these dummy accounts (as set under user maintenance) appear in reports and summary data. Data entered against a test user is usually for testing or planning purposes only, and it is most common to want to exclude this from reports.
- ii. **Stages a job plan can be published into** – allows the project manager to define whether new job plans can be published into either the draft or discussion stage or both. Some organisations may choose not to use the draft stage in order to speed up the job planning process.
- iii. **Maximum number of days a job plan can stay in draft stage** – enables the project manager to set a time limit for job plans in the draft stage if used (see above). When a number of days is specified, job plans will automatically move into the discussion stage without requiring input from the doctor or their first sign-off manager.
- iv. **Number of sign off levels** – enables the project manager to set how many sign-offs are required for each job plan (from 1-3). *Note that it is not currently possible to reduce the number of sign-off levels.*
- v. **Who will be responsible for publishing job plans to doctors?** – allows the project manager to nominate who can publish new job plans (either the project manager themselves or the first sign off manager for each doctor). The screen will list all those with publishing rights underneath the drop down menu depending on which option has been selected.

Format of Job Plans

- i. **Include in doctor's and health professional's job plan** – allows project managers to choose whether the objectives and resources steps are available within doctor's job plans.
- ii. **What should doctors be able to categorise themselves as?** - enables doctors to identify themselves by the following classifications: Clinical academic, Honorary doctor, Locum doctor, Military doctor. Identification occurs within the first wizard step of the job plan, and Trusts can choose which options to present for selection.
- iii. **Who should have access to the activities calendar?** – allows project managers to choose who can access the activities calendar from the job planning dashboard. All users enables both doctor and manager users access to the calendar, whilst managers will only display the calendar for those with any manager role.
- iv. **Should the doctors and health professionals be able to change the start date of their job plans?** – enables control of the job plan start dates to be passed to doctors themselves. Start dates can still be set when a new job plan is published.
- v. **Would you like doctors to enter Additional Programmed Activities?** – enables the project manager to turn on or off this option when doctors are entering activities into their routine work section.
- vi. **Would you like to allow doctors to enter Additional to Contract activities?** – enables the project manager to turn on or off this option when doctors are entering activities into their routine work section.
- vii. **Activities to include pre-determined travel time?** – enables the project manager to define set travel time allowances for each activity in order to introduce consistency throughout all job plans. Travel time can be added under the locations settings tab.
- viii. **Which on-call input method would you like doctors to use?** – there are two input methods for On-call work. The **Hours input method** enables doctors to enter their predictable and unpredictable on-call work in hours, with system calculating the appropriate Pas and availability supplement. The **PA input method** enables doctors to enter pre-agreed PA values for both predictable and unpredictable on-call work.
- ix. **Show PA values for doctors working the old contract?** – If no is selected, all PA values will be hidden from those doctors who have indicated that they work the old contract. This setting can be reversed at any time.
- x. **Would you like to enable hot activities?** – enables hot activities for both clinical and non-clinical activities. Department managers will be able to choose whether they utilise the hot activity functionality for their job plans. To use the functionality managers will need to enable their department setting. For more details see chapter *"Implementing the hot activity functionality"*.

Note: Once travel time or directly entered on-call PAs have been entered into job plans, these options cannot be turned off.

Trust PA Calculations

- i. **How many weeks a year are doctors and health professionals available for work?** – allows the project manager to determine the average number of weeks and days in attendance for all doctors and health professionals throughout the organisation. This option forms the basis of the prospective cover calculation for on-call working as controlled by the next setting. Managers can override this value for individual job plans in the first wizard step of the job plan during the publish or discussion stage.
- ii. **Do you want to use weeks in attendance in the on-call calculation?** – enables the project manager to determine whether on-call work is prospectively covered on the basis of doctor's weeks in attendance as set above.
- iii. **Do you want to use weeks in attendance in the annualised activity calculation?** –enables the project manager to determine whether annualised activities are prospectively covered on the basis of doctor's weeks in attendance as set above.

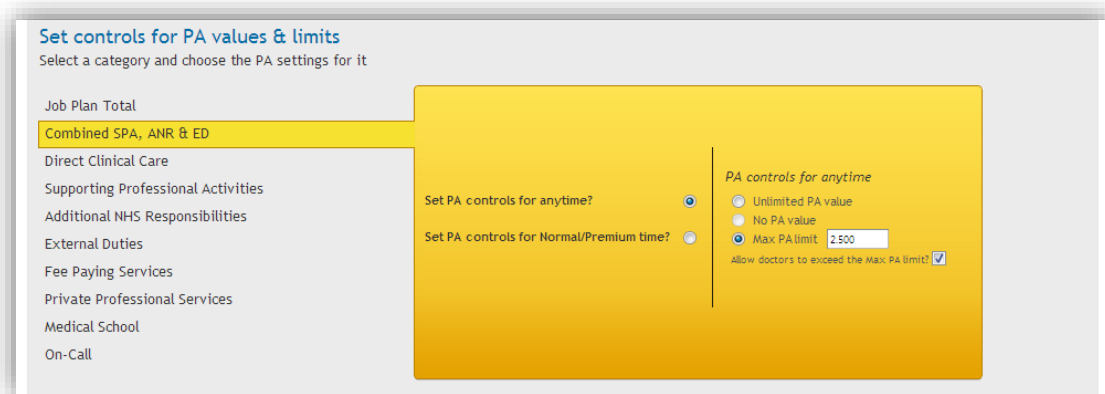
- iv. **Allow job plans to account for one PA in premium time as four hours?** – enables the project manager to determine whether premium time (7pm-7am and weekends) should attract a higher PA than normal time. Set as **no** to follow the standard English interpretation of a PA for every 3 hours of premium time. If **yes**, doctors will be able to confirm a 3 hour or 4 hour PA value within their own job plans.

Set controls for PA values & limits

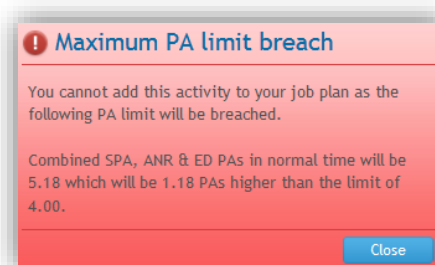
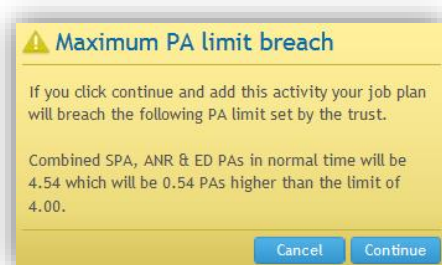
For each activity category, it is possible for the organisation to set PA limits across all doctors when entering activities into their job plans. For example, some organisations may wish to apply a 10PA limit to all job plans and not allow this to be exceeded as per their own policies.

Use the left-hand navigation to select an activity category. For each category you can choose to set PA controls for anytime (both normal time and premium time) or for normal or premium time specifically. For each option, you can select the following limitations:

- I. **Unlimited PA value** - allows an unlimited number of PAs to be entered for that category and time
- II. **No PA value** - any activity within that category and time will acquire a PA value of zero (often used for fee paying services and private professional services)
- III. **Max PA limit** - sets a maximum limit for activities within that category and time.



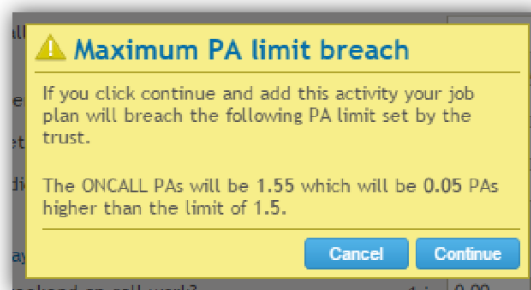
A further tickbox control under these settings enables the project manager to determine whether a doctor is able to exceed the allowances set (by placing a tick) or whether these allowances are fixed and cannot be exceeded (unticked). The following warning messages will be displayed within the job plans if a doctor exceeds the allowance:



PA limits for on-call work

To specify PA limits for on-call work, navigate to Trust Settings and scroll down to the section entitled set controls for PA values & limits. Select on-call from the category list and then choose an option for either any time or normal/premium time. If a limit is chosen, you can also decide whether or not to allow doctors to exceed this.

PA limits are checked for each time a new rota is added to the on-call wizard step.



Note: Job plans that are already in breach of any limits before they are set will not change, however it will not be possible to add further activities that exceed the limit any further.

Trust Policy

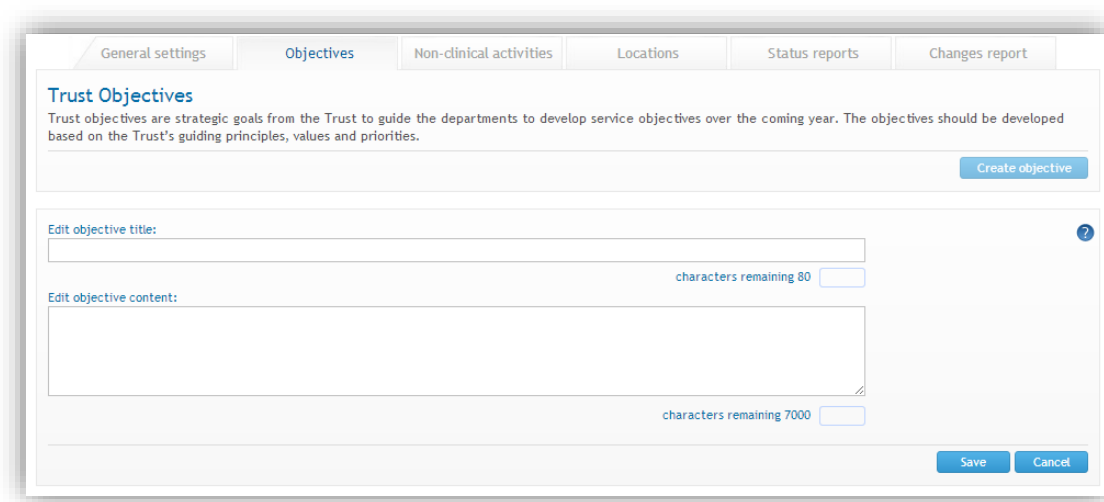
The organisation may wish to upload its own guidance documentation and make this available to all job planning users. Click **choose file** to locate the document on your local or network drives and use the accompanying dialogue box to **open** the document. The document will display on the job planning dashboard for all users.

Note: Only a single job planning guidance document can be added. You may wish to combine multiple documents into a single PDF file.

8.2 Objectives

The objectives tab (where enabled in the format of job plans section of the general settings) enables the organisation to input its own strategic objectives in order that there can be alignment through the service and personal objectives set by managers and doctors.

New objectives are defined by **create objective** button. Enter both an objective title and full description.



8.3 Non-Clinical Activities

The non-clinical activities tab holds all of the activities that do not fall under the category of direct clinical care, thus making them available for use in all job plans across the organisation. Non-clinical activities are subdivided into fixed contractual categories (e.g. supporting professional activities) and further divided into activity groupings for easier benchmarking later on. Select the **view** link against a category to view the activities.

To add, edit or remove activities click the **edit** button against the desired category. New activities can be added by typing a new activity name into bottom of the list for that particular grouping. For each newly added activity, select whether this can be used in the timetabled and non-timetabled sections of routine work, and whether doctors can also select this as an additional programme activity (APA). Click **save changes** when complete.

Existing activities can be edited by typing over their existing name (this new name will be used in all new and existing job plans). The timetabled and non-timetabled controls cannot be amended for activities that have already been utilised by doctors.

To remove an existing activity, click **delete**.

Note: *If activities are amended then the relevant changes will transfer into live job plans, however, activities cannot be deleted if they are being used in live job plans. Unwanted activities can only be deleted if all job plans in that department using the activity have been locked or signed-off. Deleted activities will continue to appear in Trust reporting if they apply to the date period selected in the report filters.*

With the introduction of the new roles, changes have been made in the Trust settings sections to enable managers to control the visibility of the non-clinical language for each of the clinical roles. On the Non-clinical tab, Visibility checkboxes are added to the activities which can be set for each role so the users with certain roles can see only the activities that are checked against their roles. The figure below shows the visibility checkboxes for the Supporting Professional Activities.

Supporting Professional Activities								
Category	Display in	Cons	SAS	AHP	Nurse	Pharm	Hot	EPA
Appraisal	<input checked="" type="checkbox"/> Timetable	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> Non-Timetable							
Audit	<input checked="" type="checkbox"/> Timetable	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> Non-Timetable							
Clinical management	<input checked="" type="checkbox"/> Timetable	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> Non-Timetable							
	<input checked="" type="checkbox"/> Timetable	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> Non-Timetable							
	<input checked="" type="checkbox"/> Timetable	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> Non-Timetable							

8.4 Locations

The locations tab holds the names of all hospital, clinical and administrative sites throughout the organisation where doctors may perform their activities. The list can be further refined by each department within the department settings. In addition, the locations tab also holds the travel time settings when switched on within the organisations general settings.

Locations

Click **edit/add locations** to edit a name or add a completely new location.

University of Dundee MS	This location cannot be deleted because it is in use.
Wonford Hospital	This location cannot be deleted because it is in use.
Richmond Hill	<input type="button" value="Add location"/>
<input type="button" value="Save"/>	

A notification will show against locations which are already in use; these cannot be deleted. To add a new location, enter the name at the bottom of the existing list in the **create new location** box and click **save**.

Location Travel Times

If specified in the organisation's general settings, the location travel times section will display below the location list. The Location travel times section enables the project manager to specify the travel time (in minutes) between any two locations listed above. It is not mandatory to set travel time between all locations.

To add a new travel time you must determine the start and end locations, then enter the **travel time** (in 15 minute intervals) for a one-way journey. Once these details are entered click **save**.

Rochester City Hospital	To/From	King William Hospital	Travel Time: 15	Delete	Edit
Seeview Community Hospital	To/From	Cloverfield	Travel Time: 15	Delete	Edit
Thatcham Hospital	To/From	New City Hospital	Travel Time: 15	Delete	Edit
Richmond Hill	To/From	King William Hospital	Travel Time: 30		Save

Travel times which have been determined and are already in use will be displayed with their **delete** and **edit** options greyed out - these cannot be amended.

8.5 On-call Rotas

In order to take the most advantage from the new on-call functionality, it is important that organisations define all of the consultant/SAS on-call rotas that take place. On-call rotas in e-JobPlan are created at the root of the organisation and are not department specific, allowing for the fact that doctors will often work rotas that span multiple departments or specialties.

8.5.1 Creating new on-call rotas

On-call rotas can be created and edited by project managers only at **Trust Settings > On-call rotas**; click edit/add rotas to enter the edit mode. At the foot of the rota list will appear a new template rota labelled 'create new rota'; replace this text with the required rota name and choose whether weekday on-call work covers Monday – Thursday or Monday – Friday. When you have made your changes click add rota and then save the screen, stating a reason for change if required. Newly added on-call rotas are available to all doctors immediately.

View & Edit Trust Settings

General settings
Objectives
Non-clinical activities
Locations
On-call rotas
Status reports
Changes report

On-call Rotas

On-call Rota	Weekday on-calls cover: <input checked="" type="radio"/> Mon - Thurs <input type="radio"/> Mon - Fri	Deactivate
Another rota	Weekday on-calls cover: <input type="radio"/> Mon - Thurs <input checked="" type="radio"/> Mon - Fri	Deactivate
Simon's new rota	Weekday on-calls cover: <input type="radio"/> Mon - Thurs <input checked="" type="radio"/> Mon - Fri	Deactivate
Surgery/T&O rota	Weekday on-calls cover: <input type="radio"/> Mon - Thurs <input checked="" type="radio"/> Mon - Fri	Deactivate
Medicine rota	Weekday on-calls cover: <input type="radio"/> Mon - Thurs <input checked="" type="radio"/> Mon - Fri	Deactivate
Create New Rota	Weekday on-calls cover: <input type="radio"/> Mon - Thurs <input checked="" type="radio"/> Mon - Fri	Add rota

Note: Try to adopt a standard naming convention for rotas that will be easy for doctors to identify when they select the name from the rota list in their job plan.

Note: Existing on-call work (added before e-JobPlan v5.9) will automatically map to the default rota name 'On-call Rota'; this will use the weekday setting that was defined by the Trust previously.

8.5.2 Weekday on-calls setting

The organisation can specify the length of the normal working week by determining whether a Friday will count as a midweek or a weekend day, thus defining whether there are 260 or 208 midweek days in a 52 week period. If Fridays are counted as part of the weekend, doctors will be asked to specify how much of their weekend work occurs in normal time. This setting was previously listed under the general settings tab but is now available to be selected for each individual rota.

8.5.3 Editing on-call rotas

On-call rotas can be added or edited at any time from the on-call rotas tab by clicking the edit/add rotas button at the top of the screen. Any changes will appear immediately in job plans.

Note: If the weekday length setting is changed against an existing on-call rota, all active job plans that are not locked down or signed-off will be recalculated and moved back into the discussion stage. This process may take several minutes to complete.

8.5.4 Deactivating/reactivating on-call rotas

On-call rotas can be deactivated at any time to prevent them from being used in any new job plans. Deactivated rotas continue to be listed on the on-call rotas page but are not available to be selected by doctors for any new on-call work. Rotas that have previously been added by doctors but are no longer active will continue to display and be editable within those job plans.

Deactivate existing on-call rotas by clicking the edit/add rotas button at the top of the on-call rotas tab and then click deactivate against the rota name. Inactive rotas continue to appear in the rota list but will be non-editable. Inactive rotas can be made active again at any time by clicking activate against the rota name.

The screenshot shows the 'View & Edit Trust Settings' interface with the 'On-call rotas' tab selected. The interface displays a list of rotas with their respective settings and status buttons.

On-call Rota	Weekday on-calls cover:	Status
On-call Rota	<input checked="" type="radio"/> Mon - Thurs <input type="radio"/> Mon - Fri	Deactivate
Another rota	<input type="radio"/> Mon - Thurs <input checked="" type="radio"/> Mon - Fri	Deactivate
Simon's new rota	<input type="radio"/> Mon - Thurs <input checked="" type="radio"/> Mon - Fri	Deactivate
Medicine rota	<input type="radio"/> Mon - Thurs <input checked="" type="radio"/> Mon - Fri	Deactivate
Surgery/T&O rota	<input type="radio"/> Mon - Thurs <input type="radio"/> Mon - Fri	Inactive (with warning icon) / Activate
Create New Rota	<input type="radio"/> Mon - Thurs <input checked="" type="radio"/> Mon - Fri	Add rota

8.5.5 Controlling the on-call entry method

The hour and PA input methods can be controlled using a new Trust setting in the format of job plans section; this setting replaces a previous setting enabling the control of the direct on-call method. The methods can be changed at any point, however work previously entered into a now disabled method can still be modified using that method.

Activities to include pre-determined travel time: Yes No

Which on-call input method would you like doctors to use? Hours input only PA input only Both

Show PA values for doctors working the old contract? Yes No

8.5.6 Calculating the on-call availability supplement

In the case where multiple on-call rotas have been added, the system will use the highest recorded frequency from all rotas (looking at both weekday and weekend frequencies) and the highest recorded category.

8.6 Status Reports

Status reports contain data concerning the progress of job plans through the sign-off stages for their relevant departments, summarising how many job plans have been signed off and how many doctors have not logged in (data that is also available within the progress report).

View & Edit Trust Settings

General settings | Objectives | Non

Project Managers

Send selected Managers status reports:

Weekly

Never (Wimbledon Hospital NHS Trust.)

Weekly (Wimbledon Hospital NHS Trust.)

Fortnightly (Wimbledon Hospital NHS Trust.)

Monthly (Wimbledon Hospital NHS Trust.)

Dr Charles, Ray (Wimbledon Hospital NHS Trust.)

Dr Cloud, Claudia (Wimbledon Hospital NHS Trust.)

Mr Director, Clinical (Wimbledon Hospital NHS Trust.)

Dr jones, v (Wimbledon Hospital NHS Trust.)

You can decide whether to send the status reports on a weekly, fortnightly or monthly basis as well as which managers receive the report.

8.7 Changes Report

The changes report keeps an audit trail of all changes made within the departmental settings. The report contains the details of those who made the changes, when they were made and the reason if given.

8.8 Implementing the hot activity functionality

8.8.1 Switching on hot activities


Hot activity functionality is controlled at both the organisation and individual department level; this allows for a staggered implementation and for individual departments to opt-out of using the functionality altogether.

Hot activities are turned on at organisation level by navigating to Trust Settings > General Settings and locating the relevant setting under the Format of Job Plans section. Saying yes to this option will simply provide an additional setting at each department level.



Would you like to give departments the option of using hot activities? Yes No

To switch on hot activity at department level, navigate to Departmental Settings > General Settings and locate the relevant setting under the General Settings section. Saying yes to this option will enable you to add hot activities to that department's DCC language as described below.



Would you like to enable hot activities in this department? Yes No

Hot activity functionality can be switched off at any time, preventing further entry of these activities within job plans. Any previously entered hot activities within job plans will be retained to prevent recalculation.

8.8.2 Defining and controlling hot activity language

As a form of validation against doctors accidentally adding prospectively covered hot, it is necessary for the project manager to identify which activities can be added as hot into the job plan. Activities identified as hot can't also be entered as routine activity worked over a 42 week period.

To add a new hot activity, ensure the 'hot' tickbox is selected and then either choose an existing activity from the list or create a new custom activity within the benchmark heading that you require. Click add and then define a name for the new activity. The activity will be listed under the benchmark heading and will display a tick in the hot column.

Administrative work directly related to clinical care

Please select an activity from the list or choose 'CREATE CUSTOM ACTIVITY' to name your own.

Please select an activity...

Add

Cons

SAS

AHP

Nurse

Pharm

Hot

Note: Managers should be aware that it is not possible to later untick the hot flag against an activity. Hot activities can be deleted in the same way as normal activities as long as they aren't being used in any active job plans.

8.8.3 Turning off the hot activity functionality

The hot activity functionality can be switched off at any time either at the organisation or department levels. Switching off hot activities will hide any created hot activity language from the departmental direct clinical care language screens and doctors will be prevented from creating any additional hot activities. Hot activities already entered into job plans will be retained in order to preserve the PA calculations. If a new copied job plan is created after the functionality has been switched off, the new job plan will still contain the original hot activities but no more can be added.

9 User maintenance

User maintenance holds the details of all doctor and manager users, their personal details, when they last logged in and a summary of your purchased and used license metrics.

Use this area to reset passwords and check email addresses for all users; you can search for users with their name, department or email. Left-click a user's name to view further details in a pop-up window.

Name	Username	Email Address	Last login	Roles
116, User	Demo	noone@zircadian.com	29/11/2013 11:33:10	Co Ma Reset Password
Alison, Angela	aalison7	Aaron.Masters@allocatesoftware.com	23/09/2013 16:05:31	Co Reset Password
Bloggs, Joanna	jbloggs68	Aaron.Masters@allocatesoftware.com		Co Reset Password
Hannigan, Patrick	PHannigan	Aaron.Masters@allocatesoftware.com		Co Inactive
Heart, Ann	aheart	noone@zircadian.com	19/09/2013 15:19:15	Co Ma Reset Password

You can also view whether the user has a manager role and whether they are a Consultant or SAS Doctor from the roles column; a legend is provided at the foot of the page.

To resend new login details for an existing user, click **reset password**. This sends a reminder of the username and a new password to the email addresses associate with that account.

The license metrics panel at the top right of the screen displays the number of clinical and manager licenses currently being utilised by active users in your organisation versus the number purchased.

Note: A doctor with a clinical and manager role requires only a single manager license perform both of these functions in e-JobPlan.

Test users

To assist with the creation of example or future job plans, and for demonstration purposes, project managers can nominate an account as a 'test user'. Test users are fictitious accounts that mimic a real user, so that the full job planning input and sign-off process can be carried out. Identifying an account as a test user will prevent the job plan and account details being displayed in the reports and dashboards throughout the system depending on the organisation's general settings. To nominate an account as a test user, left-click the account name and select **yes** against the question 'is this a test user?'. Test users continue to utilise and clinical or manager licence as appropriate.

10 Additional Help

10.1 From your Trust

Your Trust will have appointed a project manager who will be familiar with the job planning process and the management of the e-JobPlan module; their details can be found at the top of the support tab.

10.2 From allocate software

Allocate Software's HealthMedics support team are on-hand during normal office hours (0900-1730) to support users with any module of the HealthMedics Optima. They can be contacted via email at support@allocatesoftware.com.

You can also find various documents in the support tab which provide further information, including documents on calculations and guidance from NHS Employers and the BMA.

10.3 Providing feedback

We would very much appreciate your feedback about the e-JobPlan module whether positive or negative. It is important for us to identify things that work well, but also things that might cause annoyance or frustration. We strive to take all feedback on board and consider any changes that might enhance user experience.

You can provide us with feedback at any time by emailing support@allocatesoftware.com or by clicking the **send feedback** link at the foot of every page.



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