



ALLOCATE

eJobPlan

A guide for SAS Doctors (Wales)

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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, 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 sessions 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 doctor users of e-JobPlan who are completing and submitting their own job plan. This guide is intended to showcase the primary system features that relate to the creation and modification 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 Board 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.

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.

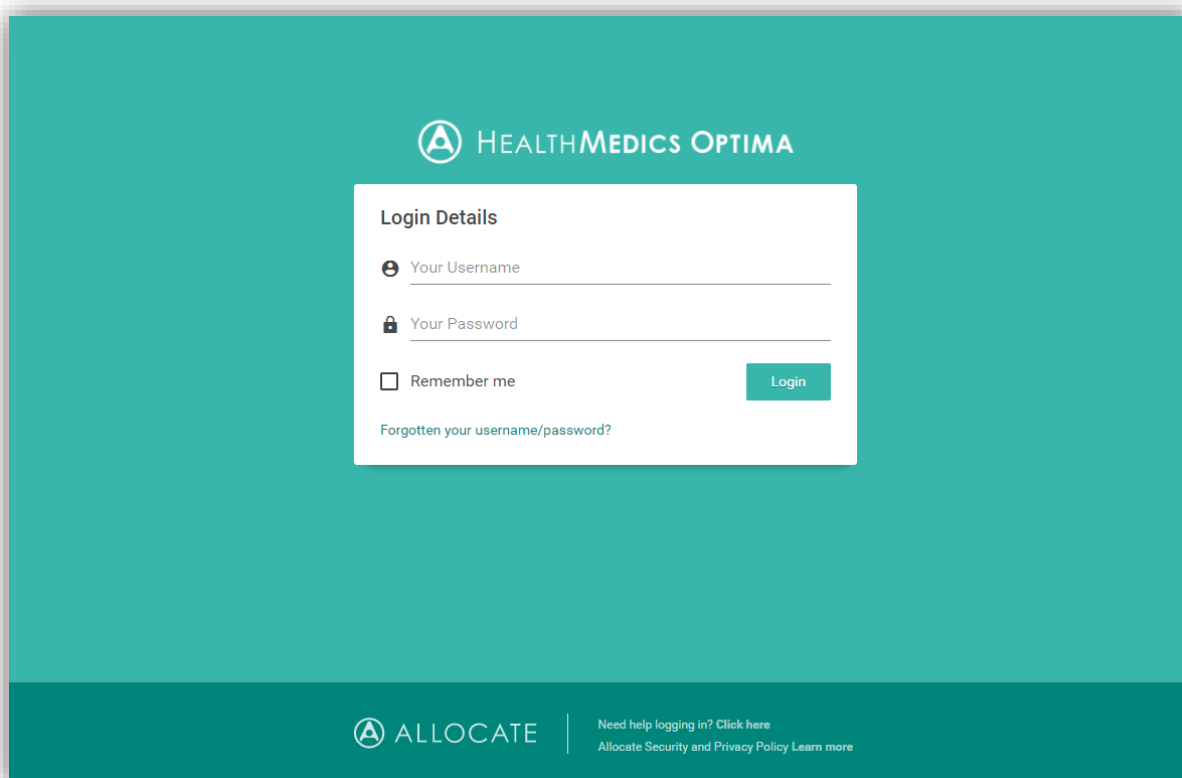
You can provide us with feedback at any time by clicking the Feedback link at the top of every page.

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 Working on your job plan

Before you can start working on your job plan, a new plan will need to be published or an existing job plan to be re-published to your account by your organisation's project manager or your own sign-off manager.

My Job Plan

Messages & Alerts

Send a message to your manager (Mr Phillips, Mike).

Send

ALERTS are on-screen messages and emails about what is happening in your job planning. Currently all alerts are turned off. Choose which alerts to receive by going to [Preferences](#).

You have no alerts


Reports

Please select a change report ▼

View/print report

Current Job Plan:

This job plan started 04 April 2016.



Department: Trauma & Orthopaedics

| | | |
|-------------------------|--|---------------|
| Total sessions to date: | Planned | 9.560 |
| | Temporary Contracted Additional Sessions | 0.533 |
| | Total = | 10.093 |

Total hours to date:

| | |
|--|--------------|
| Planned | 39:17 |
| Temporary Contracted Additional Sessions | 2:00 |
| Additional To Contract | 0:11 |
| Total = | 41:28 |

Status: Discussion - your job plan is editable
In this stage, you and your manager can edit/review your job plan before you agree to it.

Contract type: New

First Sign Off: Mr Phillips, Mike

Second Sign Off: Mr Phillips, Mike

Third Sign Off: Mr Smith, Richard

Printable job plan Outcomes report Edit job plan Request sign off

Job plan library

| Period | Current Stage | Level | Last Changed |
|---------------------------|-----------------------|-----------------------|---------------------|
| > 04/04/2016 | In 'Discussion' stage | Trauma & Orthopaedics | 21/04/2016 15:29:01 |
| 01/04/2015 --> ongoing | 3rd Sign-off agreed | Trauma & Orthopaedics | 21/04/2016 15:28:20 |
| 01/04/2014 --> 31/03/2015 | 3rd Sign-off agreed | Trauma & Orthopaedics | 08/09/2014 17:15:20 |

3.1 Understanding the job plan stages

e-JobPlan helps to facilitate each job plan moving through a staged life-cycle, from being published to signed-off.

| | |
|---------|--|
| Publish | <ul style="list-style-type: none"> 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 Board settings) |
|---------|--|

| | |
|--|--|
| | <ul style="list-style-type: none"> Trust can choose to publish straight into either the draft or discussion stages |
| Draft (optional) | <ul style="list-style-type: none"> SAS doctors only view of job plan which can be edited as required Job plan does not feature on any reports |
| Discussion | <ul style="list-style-type: none"> Job plan visible by SAS doctor and Health Board. 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 |
| 1 st sign-off | <ul style="list-style-type: none"> Job plan no longer editable by either party Electronic sign-off performed by nominated first sign-off manager 1st sign-off manager or SAS doctor can elect to push job plan back to discussion if necessary |
| 2 nd and 3 rd sign-off | <ul style="list-style-type: none"> Optional electronic sign-off performed by nominated second sign-off manager and third sign-off manager 2nd/3rd sign-off manager can elect to push job plan back to discussion if necessary |
| Signed off | <ul style="list-style-type: none"> Job plan completed and locked down |
| Mediation | <ul style="list-style-type: none"> 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 |

4 Working on your job plan

To begin editing the job plan either select **edit job plan** or **start job plan** from the **my job plan** page, this will take you to the job plan wizard.

4.1 Required information

Your basic information should be entered here; if the start date is incorrect then your sign off manager or Project Manager can amend this on your behalf.

Job Plan Wizard Step

1.REQUIRED INFORMATION > 2.PERSONAL OUTCOMES > 3.ON-CALL > 4.CYCLE > 5.ROUTINE WORK > 6.RESOURCE > 7.SUMMARY > 8.FINISH

Basic information

Please select the date this job plan will start:

Have you signed up to the new contract? ☒ Yes ☐ No

Where is your usual place of work?

Do you work full-time or part-time? ☒ Full-time ☐ Part-time

Do you have an alternate employer? ☒ Yes ☐ No

Please provide the name of your alternate employer:

Do you identify with any of the following?

- ☒ Clinical Academic
- ☐ Honorary Doctor
- ☐ Locum Doctor
- ☐ Military Doctor

Please provide the name of your university:

How many weeks a year are you available for work? weeks, days

Use this section to upload additional files to support your job plan.

[upload/delete a file](#)

No documents uploaded.

If you would like to exit the wizard and return at a later date please click [save and exit](#).

[Save & Continue](#)

4.1.1 Classification identification from job plan wizard

If classification options have been selected within Board settings, the required information wizard step of job plans in development will display an additional non-mandatory question labelled *do you identify with any of the following?*

When selecting either the clinical academic or honorary doctor options, doctors will also be able to indicate which university this relates to if applicable.

Do you identify with any of the following?

☒ Clinical Academic
☐ Honorary Doctor
☐ Locum Doctor
☐ Military Doctor

Please provide the name of your university:

The printable job plan has been updated to include fields for doctor classification and university name in the basic information section.

4.1.2 Uploading external documents

External documents can now be uploaded into individual job plans by doctors who wish them to be included in the sign-off discussions with their managers.

Unlimited documents of up to 5MB each can be uploaded to the job plan with the following supported file formats: .doc, .docx, .pdf, .jpg, .jpeg.

Clicking **upload/delete a file** on the required information wizard step opens a new dialogue box from where documents can be searched and attached.

Do you identify with any of the following?

☐ Clinical Academic
☐ Honorary Doctor
☐ Locum Doctor
☐ Military Doctor

Use this section to upload additional files to support your job plan.

[upload/delete a file](#)

No documents uploaded.

If you would like to exit the wizard and return at a later date please click [save and exit](#).

[Save & Continue](#)

A non-mandatory description of the file can be provided.

Upload/Delete a File

Upload a File.
Valid file extensions are: .doc, .docx, .pdf, .jpg, .jpeg

[Select](#) [Upload](#)

Uploaded Files:

| Form name | Description | Actions |
|-----------------------|-------------|---------|
| No documents uploaded | | |

[Close](#)

Attached documents can be viewed by all managers that already have access to that particular job plan. Attached documents apply to the individual job plan only and do not copy forward into any future job plans.

4.1.3 Ability to set weeks in attendance at individual job plan level

Where doctors have individualised leave entitlements (possibly as a result of locally negotiated leave/additional days for seniority/increased study), it is now possible to set weeks in attendance at individual job plan level. This functionality enables managers to override the organisation's weeks in attendance default value.

The weeks in attendance is set by individual managers from the basic information wizard step when editing a job plan prior to publishing or during the discussion stage. The project manager can also edit this value if they have publish rights. This field is visible and editable only by the manager and not the doctor themselves. Making a change to the value will automatically update the associated calculations throughout the job plan.

| | | | | |
|---|---------------------------------|--------|--------------------------------|------|
| How many weeks a year are you available for work? | <input type="text" value="42"/> | weeks, | <input type="text" value="0"/> | days |
|---|---------------------------------|--------|--------------------------------|------|

Doctors are able to view the weeks in attendance figure from the session breakdown section of the routine work step.

| Session breakdown | |
|--------------------------------------|----------------|
| Total sessions to date: | Planned 12.805 |
| | TCA 0.000 |
| | Total = 12.805 |
| Total hours to date: | Planned 48:02 |
| | TCA 0:00 |
| | ATC 0:00 |
| | Total = 48:02 |
| Expected no. of weeks in attendance: | 42 weeks |

4.2 Personal outcomes

If enabled, outcomes can be set at organisation, service (departmental) and personal level. Before creating your own personal outcomes, it is important to review those set by the organisation and your own department so that your own outcomes are aligned. Select create objective to enter details of a new objective. Enter a title and content and then choose whether you want to link this to a service objective. Once the details have been entered click save.

Create objective

Edit objective title:
Patient Care

characters remaining 68

Edit objective content:
Strive to ensure patient care is priority number 1 at all times

characters remaining 6937

Service objective to link to:
None available

Save Cancel

Save & Continue

If you would like to exit the wizard and return at a later date please click save and exit.

4.3 Adding on-call work to the job plan

The job plan's on-call wizard step has been updated to enable multiple on-call rotas to be added and viewed in a single screen. The on-call rotas section will list the added rotas, whilst the summary section will detail the total sessions and availability supplement. Depending on the organisation's settings, doctors will be able to enter their work by either entering the number of hours they undertake or by entering an agreed number of sessions. The following sections describe these methods in more detail.

Job Plan Wizard Step

1.REQUIRED INFORMATION > 2.PERSONAL OUTCOMES > 3.ON-CALL > 4.CYCLE > 5.ROUTINE WORK > 6.RESOURCES > 7.SUMMARY > 8.FINISH

SAS Information

As a SAS doctor, you might be required to work regular shifts on a junior doctor rota. If this is the case, you will be able to select the activity labelled 'Shift on Junior Doctor Rota' from the 'Direct Clinical Care' category on the Routine Work step of your job plan.

Note:
You work on-calls if you are non-resident out-of-hours and return to hospital only when needed. Normally when working on-call, you are on duty for a day, a night and another day. You work shifts when you have to stay on site and remain immediately available for work. The length of your shift will normally be 13 hours or less.

On-call Rotas

Add Rota by Hours Add Rota by Sessions

| Rota Name | Location | Weekday Freq | Weekend Freq | Supplement | Sessions | Actions |
|--------------|----------|--------------|--------------|------------|----------|---------|
| On-call Rota | Loc 1654 | 10 | 4 | 6% | 0.625 | X |

On-call Summary

The total sessions arising from your on-call work is: 0.625

Your availability supplement is: 6%

4.3.1 Hours entry method

The hours entry method (formerly the calculator method) enables doctors to enter their on-call rotas using the known time spent performing predictable and unpredictable emergency work; from this, the system calculates the number of sessions. This method of entry is switched on by default for all organisations but can be switched off from the Board settings.

It is possible for an on-call rota to be saved with a weekday or weekend frequency but no hours in the case where the doctor may attract an availability supplement but no additional sessions.

On-call rota details (hours entry)

General information

What is your on-call activity?

Select an option...

Where does your on-call rota take place?

Select an option...

Weekday work

What is the frequency of your weekday on-call work?

1 in 0.00

Do you work your weekday on-call on a specific day?

No fixed day

What are your average hours of emergency work per weekday on-call?

Predictable00:00Unpredictable00:00

How much of this takes place between 19:00 & 07:00? (premium time)

00:0000:00

How much of your weekday predictable on-call work displaces other activities?

00:00

Weekend work

What is the frequency of your weekend on-call work?

1 in 0.00

What are your average hours of emergency work per weekend on-call?

Predictable00:00Unpredictable00:00

Does your weekend predictable work displace other activities?

Yes

No

Other information

Which outcome does this on-call work relate to?

No linked Outcomes

Comments

Cancel

Save

Within the weekend work section, the system will clarify whether a weekend is classed as Friday to Sunday or Saturday to Sunday (depending on the option chosen in the on-call rota section of the Board settings). If the weekend is classed as Friday to Sunday, an extra question appears in this section asking how much weekend work takes place before 19:00 on Friday (i.e. how much weekend work occurs during normal time).


The following table lists the fields that make up the hours entry method.

| Field | Hover-over help text | Additional information |
|---|---|---|
| General information | | |
| What is your on-call activity? | Select the rota name or description that is the closest match for the on-call work you do. Use the comments box below if you need to provide further clarity. | Lists all active on-call rota names defined in Board settings. |
| Where does your on-call rota take place? | The location at which you perform the majority of your on-call work. | Lists all Board locations, regardless of those defined for the specific department. |
| Weekday work | | |
| What is the frequency of your weekday on-call work? | If only full-time doctors participate in your on-call rota in equal measure, then your on-call frequency is the same as the doctor headcount: 8 full-time doctors sharing an on-call rota | The rota's weekday frequency, equal to the number of rota participants and excluding any allowance for prospective cover. The rota can be saved with a frequency but no hours |

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| | | |
|--|---|---|
| | equally would work a frequency of 1:8. Whether you work on-call in single days or in whole weeks, the frequency in weeks is the same as the frequency in days. | to allow doctors to record that on-call work takes place even if no remuneration is made. |
| Do you work your weekday on-call on a specific day? | If you carry out your on-call work on a fixed day each week, select that day here. | Recorded for information only – this doesn't contribute towards the calculations. |
| What are your average hours of emergency work per weekday on-call? | Indicate how many predictable and unpredictable hours you work on average during each weekday on-call duty (in hh:mm format). | Records how many normal time hours are worked per weekday on-call. |
| How much of this takes place between 19:00 & 07:00? (premium time) | Indicates how much of your predictable and unpredictable on-call work takes place during premium time (in hh:mm format). | Records how much of your predictable and unpredictable on-call work takes place during premium time |
| How much of your weekday predictable on-call work displaces other activities? | Indicates how many hours of this on-call work displaces other activities on your job plan. Work that displaces other activities does not attract any additional Session value. | Calculates if on-call work displaces other activities. |
| Weekend work | | |
| What is the frequency of your weekend on-call work? | If only full-time doctors participate in your on-call rota in equal measure, then your on-call frequency is the same as the doctor headcount: 8 full-time doctors sharing an on-call rota equally would work a frequency of 1:8. Whether you work on-call in single days or in whole weeks, the frequency in weeks is the same as the frequency in days. | The rota's weekday frequency, equal to the number of rota participants and excluding any allowance for prospective cover. The rota can be saved with a frequency but no hours to allow doctors to record that on-call work takes place even if no remuneration is made. |
| What are your average hours of emergency work per weekend on-call? | Indicate how many predictable and unpredictable hours you work on average during each weekend on-call duty (in hh:mm format). | Records how many premium time hours are worked per weekend on-call. |
| Does your weekend predictable work displace other activities? | Indicates whether the predictable element of your weekend on-call work displaces other activities on your job plan. Work that displaces other activities does not attract any additional Session value. | Calculates if on-call work displaces other activities. |
| Other information | | |
| Which outcome does this on-call work relate to? | Select an appropriate personal objective that aligns with this on-call work. If there is no personal objective, consider aligning it with a service outcome. | Enables the doctor to attach a personal or service objective to this on-call rota. |

| | |
|----------|--|
| Comments | Note any further comments you'd like to make about this oncall work. |
|----------|--|

4.3.2 Sessions entry method

The sessions entry method (formerly the direct method) enables doctors to record their on-call rotas by entering a pre-defined session value. This method will only be available automatically if the organisation previously had the direct method of on-call enabled; otherwise it can be switched on in the Board settings

The following table lists the fields that make up the sessions entry method.

| Field | Hover-over help text | Additional information |
|---|---|---|
| General information | | |
| What is your on-call activity? | Select the rota name or description that is the closest match for the on-call work you do. Use the comments box below if you need to provide further clarity. | Lists all active on-call rota names defined in Board settings. |
| Where does your on-call rota take place? | The location at which you perform the majority of your on-call work. | Lists all Board locations, regardless of those defined for the specific department. |
| Weekday work | | |
| What is the frequency of your weekday on-call work? | If only full-time doctors participate in your on-call rota in equal measure, then your on-call frequency is the same as the doctor headcount: 8 full-time doctors sharing an on-call rota | The rota's weekday frequency, equal to the number of rota participants and excluding any allowance for prospective cover. The rota can be saved with a frequency but no hours |

| | | |
|--|--|---|
| | equally would work a frequency of 1:8. Whether you work on-call in single days or in whole weeks, the frequency in weeks is the same as the frequency in days. | to allow doctors to record that on-call work takes place even if no remuneration is made. |
| How many sessions arise from your weekday on-call work? | Indicate how many sessions you have allocated for both your predictable and unpredictable on-call work. | Records the agreed number of sessions for weekday work on this rota. |
| Weekend work | | |
| What is the frequency of your weekend on-call work? | If only full-time doctors participate in your on-call rota in equal measure, then your on-call frequency is the same as the doctor headcount: 8 full-time doctors sharing an on-call rota equally would work a frequency of 1:8. Whether you work on-call in single days or in whole weeks, the frequency in weeks is the same as the frequency in days | The rota's weekday frequency, equal to the number of rota participants and excluding any allowance for prospective cover. The rota can be saved with a frequency but no hours to allow doctors to record that on-call work takes place even if no remuneration is made. |
| How many sessions arise from your weekend on-call work? | Indicate how many sessions you have allocated for both your predictable and unpredictable weekend on-call work. | Records the agreed number of sessions for weekend work on this rota. Other. |
| Other information | | |
| Which outcome does this on-call work relate to? | Select an appropriate personal outcome that aligns with this on-call work. If there is no personal outcome, consider aligning it with a service objective. | Enables the doctor to attach a personal or service outcome to this on-call rota. |
| Comments | Note any further comments you'd like to make about this on-call work. | |

4.3.3 SAS doctor on-call work

In previous versions of e-JobPlan, it was necessary for SAS doctors to choose whether to enter their on-call work via the on-call wizard step or via an activity on the routine work screen labelled 'shift on a junior doctor rota'. This option has now been removed, allowing SAS doctors to enter on-call work in either way or using both methods. The 'shift on a junior doctor rota' DCC activity is now a permanent addition to the activity language for SAS doctors regardless of the language settings for that department.

SAS Information

As a SAS doctor, you might be required to work regular shifts on a junior doctor rota. If this is the case, you will be able to select the activity labelled 'Shift on Junior Doctor Rota' from the 'Direct Clinical Care' category on the **Routine Work** step of your job plan.

Note:

You work on-calls if you are non-resident out-of-hours and return to hospital only when needed. Normally when working on-call, you are on duty for a day, a night and another day. You work shifts when you have to stay on site and remain immediately available for work. The length of your shift will normally be 13 hours or less.

Note: SAS doctor on-call work entered as a shift on a junior doctor rota from the routine work step is reported as a separate DCC activity from predictable and unpredictable emergency work.

4.3.4 Reviewing on-call work on the routine work step

The routine work wizard step continues to display a summary of recorded on-call work; however this is now split out by rota name. For each rota both the normal and premium time hours are displayed alongside the sessions total. In the cases where rotas have been added using the sessions entry method, the routine work on-call summary will display 'n/a' for the normal and premium time hours as these won't have been captured in the on-call step.

| On-call (Unspecified Weekday, Weekend) | | |
|--|------|-------|
| Type | Time | Sess |
| T&O (1:6 B3) BE, RC, CC, RG, WQR, KY | 8:15 | 0.771 |
| | | 0.771 |

4.3.5 Reviewing on-call work on the summary step

The summary wizard step of the job plan displays the sessions and hours breakdown for each activity benchmark heading, grouped by category. On-call work will be summarised under the 'predictable emergency work' and 'unpredictable emergency work' headings. The hour's figures are given as an average per week assuming (for on-call work only) that this is prospectively covered. Where on-call work has been entered via the sessions method, the system will multiply the entered sessions by the hour's value of a single session (4) to give an approximate figure.

Job Plan Wizard Step

1.REQUIRED INFORMATION > 2.PERSONAL OUTCOMES > 3.ON-CALL > 4.CYCLE > 5.ROUTINE WORK > 6.RESOURCES > **7.SUMMARY** > 8.FINISH

Note: This step allows you to check if the balance of activities between session types is consistent with national and local guidelines.

Click the '+' sign on the left of each row to view a detailed breakdown of each category.

Summary of Sessions

| Category | Activity | Planned sessions | TCA sessions | Total sessions | Planned hours | TCA hours | ATC hours | Total hours |
|---------------|------------------------------|------------------|--------------|----------------|---------------|-----------|-----------|-------------|
| - | DCC | 0.625 | 0.000 | 0.625 | 2:15 | 0:00 | 0:00 | 2:15 |
| | Predictable Emergency Work | 0.417 | 0.000 | 0.417 | 1:30 | 0:00 | 0:00 | 1:30 |
| | Unpredictable Emergency Work | 0.208 | 0.000 | 0.208 | 0:45 | 0:00 | 0:00 | 0:45 |
| Grand Totals: | | 0.625 | 0.000 | 0.625 | 2:15 | 0:00 | 0:00 | 2:15 |

NB: Rounding to 3 decimal places may mean that there are small differences between totals and the detailed breakdown.

If you would like to exit the wizard and return at a later date please click [save](#) and [exit](#).


[Continue](#)

4.3.6 Reviewing on-call work in the printable job plan view

The printable job plan has been updated to account for the new on-call functionality. Whereas in the previous printable job plan on-call work was split into two sections, the new view brings all the on-call detail into the same section.

The on-call summary section lists the summary details for each on-call rota, mirroring the table shown on the on-call wizard step within the job plan itself. This is followed by the predictable and unpredictable session breakdown. Below this, the total on-call sessions and the highest on-call band is shown.

On-call summary

| | | | | | | Show  |
|--------------|----------|--------------|--------------|------------|----------|--|
| Rota Name | Location | Weekday Freq | Weekend Freq | Supplement | Sessions | |
| On-call Rota | Loc 1654 | 10 | 4 | 6% | 0.625 | |

| Type | Normal | Premium | Cat. | Sess |
|---------------|--------|---------|------|-------|
| Predictable | 2:00 | 2:00 | DCC | 0.417 |
| Unpredictable | 1:00 | 1:00 | DCC | 0.208 |
| Total: | | | | 0.625 |

| | |
|---|--|
| The total Sessions arising from your on-call work is: | 0.625 |
| Your availability supplement is: | 6% (based on the highest supplement from all your rotas) |

Detailed rota information is also displayed to match the field inputs of the on-call entry popups within the job plan wizard step.

On-call rota details

Show 

On-call Rota (hours entry)

| | | |
|---|--------------|---------------|
| General information | | |
| What is your on-call activity? | On-call Rota | |
| Where does your on-call rota take place in? | Loc 1654 | |
| Weekday work | | |
| What is the frequency of your weekday on-call work? | 1 in 10.00 | |
| Do you work your weekday on-call on a specific day? | No fixed day | |
| | Predictable | Unpredictable |
| What are your average hours of emergency work per weekday on-call? | 02:00 | 01:00 |
| How much of this takes place between 19:00 & 07:00? (premium time) | 00:00 | 00:00 |
| How much of your weekday predictable on-call work displaces other activities? | 00:00 | |
| Weekend work (A weekend is classed as Saturday to Sunday for this rota) | | |
| What is the frequency of your weekend on-call work? | 1 in 4.00 | |
| | Predictable | Unpredictable |
| What are your average hours of emergency work per weekend on-call? | 02:00 | 01:00 |
| Does your weekend predictable work displace other activities? | No | |
| Other information | | |
| Which outcome does this on-call work relate to? | | |
| Comments | | |

4.4 Cycle

The cycle of the job plan requires you to specify the number of weeks that your most regular routine activities cycle over. The cycle can be different from the frequency specified in your on-call work, and it doesn't have to match the frequency of all your activities. Where you may have ad-hoc activities that occur on a less regular basis (e.g. a meeting that occurs three times a year), these can be entered as annualised activities that occur outside of your normal cycle. Where possible, you should aim to fit the majority of your activities into a regular cycle as this will assist your service in ensuring that the correct cover is available for specific clinical activities.

e-JobPlan allows doctors to select a job planning cycle of up to 26 weeks. This enables greater flexibility for adding more complex activity cycles.

Note: If you choose reduce the cycle length after entering activities, any activities that occurred in the removed weeks will be deleted from the routine work section. You will be asked to accept this condition when reducing the cycle.

Note: If you work a monthly cycle then you may wish to add a 5th week each quarter by selecting 4 weeks from the cycle length and then ticking the additional week box at the bottom.

Work Cycle: The number of weeks the *majority* of your work activities repeat over

Please choose a work cycle:

- 01 week
- 02 weeks**
- 03 weeks
- 04 weeks
- 05 weeks
- 06 weeks
- 07 weeks
- 08 weeks
- 09 weeks
- 10 weeks
- 11 weeks
- 12 weeks
- 13 weeks

☐ Add an additional week each quarter (only applicable to a four week cycle)

Work Cycle Examples

Click on the 'Example' links

[Example 1](#) / [Example 2](#)

A consultant completes 20 regular
This job cycle would be a 4 week months.

Job Plan Start Week

Choose Start Week

01 ▾

4.4.1 Job Plan Start Week

The **job plan start week** refers to the week of the cycle on which the start date of the job plan falls – this ensures that the activity calendar and the e-Leave module (where available) have accurate information.

4.5 Routine work

The routine work step captures the detail of your regular activity, including non-DCC activities, work performed for other organisations and any private practice commitments. The routine work screen is split, with details of weekly timetabled activities occurring on specified days towards the top, and annualised activities towards the bottom.

4.5.1 Entering a new activity

The left-hand panel of the routine work stage enables you to add new timetabled and annualised activities, as well as review and edit activities already saved. Work through the fields as described in the following table, before clicking **add** at the foot of the panel. Mandatory fields are highlighted with a red asterisk.

Add new activity

Day * Please choose... ▾

Category * Choose a day... ▾

Activity * Choose a category... ▾

Activity Location King William Hospital ▾

Is travel time linked to this activity? ☐ Yes ☒ No

| | |
|-------------------------|---|
| Day | Select the day of the week that this activity occurs. Flexible activities that do not occur on a specified day can be entered as no specified day . |
| Category | Select the activity category. These are the contractual terms used to filter the available activities in the next field. |
| Activity | Select an individual activity. Available activities are filtered by the category as selected previously. Direct clinical care activities will be defined by your clinical manager specifically for your own department, whilst all non-clinical activities are generic across your organisation. If you cannot find an activity, select a suitable alternative and then make a note of this at the foot of the panel. You may wish to discuss this with your manager. |
| Activity location | Select the hospital/clinic site where this activity takes place. Activity locations are defined by clinical managers for each department. If you cannot find a location, select a suitable alternative and then make a note of this at the foot of the panel. |
| Travel time | Indicate whether travel time is linked to this activity. This step will appear only if your organisation has set pre-determined travel time between locations. If so, select the from and to locations – the system will automatically make an allowance for the travel time between these sites. Where there is no travel time option, use the default travelling time activity under direct clinical care to enter this as a separate activity. |
| Start and end | Enter the start and end times of your activity in hh:mm format. Start and finish times must be rounded to the nearest 15 minute interval. |
| Related time | Indicate in hours and minutes, the time associated with the activity, for example administrative overhead. |
| Weekly timetabled | Select the weekly timetabled option if this activity occurs within the cycle that you selected on the previous step. You'll then be able to choose the weeks worked by selecting the relevant tick boxes below. |
| Annualised | Select the annualised option if this activity falls outside of the cycle that you selected on the previous step. You'll then be able to enter the number of delivered activities each year. |
| Activity categorisation | Depending on the settings chosen by your organisation, you may have the options of Core, TCA (Temporary Contracted Additional sessions) and ATC (additional to contract). These categorisations are defined when you hover your mouse over the field. If you are unsure how to classify your work, select the default option of Core and then discuss this further with your first sign-off manager. |
| Link objective | Decide whether to link this activity to a service or personal objective. |
| Employer | Select whether this activity is carried out for your main employer, or an alternative employer that you may have defined on the basic information wizard step. |
| Comments | Enter any additional comments you think might be relevant for your sign-off managers. |

4.5.2 Restrictions on saving an activity


The following restrictions may arise when you try to enter a new activity:

- I. The add button will be disabled if any of the required fields are missing data.

- II. The system will prevent overlapping activities for any given time period where they occur on a specified day. Where an activity runs concurrently or replaces another activity, this should be entered as no specified day in the day field.
- III. The system limits the number of occurrences of an activity on any given time slot to no more than the weeks in attendance set by your manager. Your expected number of weeks in attendance is displayed in the session breakdown box below the add activity panel.
- IV. Some organisations may choose to place limits on certain activity categories. Depending on your system's settings, these may sometimes prevent you from adding activities that push your job plan over a pre-defined limit.

4.5.3 Reviewing and editing routine work activities

When activities are added they will appear in the timetable on the right of the page. Each activity displays details of the start and end times, activity name and details of the number of activities per year, hours per week and hours per year. The system will also calculate the number of sessions that the activity is worth based on the hours and number of weeks in attendance. Activities with a sessions value shown in brackets mean that these do not contribute to the total session values of the job plan (in the case where they may replace or run concurrently with other activities). Each activity will be highlighted with a colour representing the activity category.

To edit an activity select . The activity details will appear in the add activity panel to the left of the screen from where you can edit any of the fields. Click **add** once you have finished making any changes.

To delete an activity select . Deleted activities cannot be retrieved.

| | Start | End | CRA | Activity | Num/Yr | Sess | Hrs/Wk | Hrs/Yr | |
|---------|-------|-------|------|---|---------|-------|--------|--------|---|
| HOI | 08:00 | 19:00 | 0:00 | Trauma week (wk 8 of 8 wks) | 6.5 | 0.454 | 1:42 | 71:30 |   |
| SHR | 09:00 | 13:00 | 0:00 | Outpatients - Specialist Clinic (wks 1-2) | 35.5 | 0.902 | 3:23 | 142:00 |   |
| | 13:30 | 17:30 | 0:00 | Operating Session - Emergency/Trauma (wk 2) | 21 | 0.533 | 2:00 | 84:00 |   |
| | 17:30 | 18:00 | 0:00 | Core SPA (wk 1) | 21 | 0.067 | 0:15 | 10:30 |   |
| Totals: | | | | | Planned | 1.956 | 7:20 | 308:00 | |
| | | | | | TCA | 0.000 | 0:00 | 0:00 | |
| | | | | | ATC | | 0:00 | 0:00 | |

All session values now display to three decimal places, including the job plan wizard, printable job plan and all reports. The calculations and results themselves remain unchanged as this data has always been stored in the database at seven or more decimal places.

4.5.4 Sessions breakdown

The sessions breakdown box underneath the add activity panel will show the total number of sessions recorded so far (including any on-call work), as well as the equivalent hours. The box will also detail the number of weeks in attendance that has been set for you by your manager, as well as the hour's equivalent for a premium time sessions.

| Session breakdown | | |
|--------------------------------------|----------|--------|
| Total sessions to date: | Planned | 9.560 |
| | TCA | 0.533 |
| | Total = | 10.093 |
| Total hours to date: | Planned | 39:17 |
| | TCA | 2:00 |
| | ATC | 0:11 |
| | Total = | 41:28 |
| Expected no. of weeks in attendance: | 42 weeks | |

4.6 Hot activities

Hot activity is the name we give to those activities that are delivered by doctors all year round, including the cover of annual leave. This type of work is often referred to throughout the NHS as hot week.

Unlike normal routine activity that is only delivered during the weeks in attendance, hot activity is worked across the calendar year meaning that doctors will need to swap with each other to maintain coverage – we refer to this as prospective cover. As a result, hot activities will attract a prospective cover uplift to the number of delivered activities reflecting this additional prospective cover.

4.6.1 Calculation of hot activity

Hot activity entered into the job plan as weekly timetabled is calculated differently to other activity. Hot activity takes into account the requirement to cover this work during periods of leave, thus including a prospective cover factor. This assumes that the activity is worked across a 52 week period, with an individual doctor's contribution condensed into their weeks in attendance (normally 42 weeks).

In the first example (Figure bellow), we have a 4-hour weekly timetabled activity taking place once every four weeks during normal time that would typically attract a sessions value of 0.250 from an average of 10.5 delivered activities per year. The number of delivered activities is calculated by dividing the weeks in attendance (42 for this job plan) by the frequency (4 in this example) to give 10.5.

| Start | End | Activity | Num/Yr | Sess | Hrs/Wk | Hrs/Yr | |
|-------|-------|---------------------------------|--------|-------|--------|--------|-----|
| 09:00 | 13:00 | Clinical diagnostic work (wk 1) | 10.5 | 0.250 | 1:00 | 42:00 | X / |

In the second example (Figure bellow) we have a hot activity. Again, it is recorded as being four hours in length during normal time and occurs once every four weeks. This time, the system increases the number of delivered activities to 13 having divided the calendar year (52 weeks) by the frequency (4 in this example). As a result, we see an uplift in the overall sessions/PA value for this activity.

| Start | End | Activity | Num/Yr | Sess | Hrs/Wk | Hrs/Yr | |
|-------|-------|------------|--------|-------|--------|--------|-----|
| 09:00 | 13:00 | HOT (wk 1) | 13 | 0.310 | 1:14 | 52:00 | X ✓ |

4.6.2 Adding hot activities to a job plan

When a designated hot activity is selected by the doctor for entry into their job plan, they will be alerted to the fact that the activity will attract a prospective cover factor and that activities occurring at the same time may have their sessions reduced to accommodate increased occurrences of the hot activity.

Add new activity

Day *

Monday

Category *

Direct Clinical Care

Activity *

Hot Core

You have selected an activity that has been flagged as a "hot" activity by your manager. This activity will attract a prospective cover factor and any unlocked weekly timetabled activities occurring on the same day may be shrunk to accommodate this.

It is possible to assign a cycle length to a hot activity that is different from the cycle of the job plan. Use the cycle length drop down to select a cycle length of up to 26 weeks (Figure bellow). The frequency of the activity within this cycle can be determined by selecting the appropriate weeks worked. Changing the cycle of the job plan itself at a later point will not affect the hot activity cycles.

Cycle Length

6

Weeks worked

☒ 01

☐ 02

☐ 03

☐ 04

☐ 05

☐ 06

4.6.3 Creating space for weekly timetabled hot activities

Weekly timetabled hot activities include an uplift of the number of delivered occurrences as a result of prospective cover (see 4.6.1). This increase means that over the course of the doctor's weeks in attendance, there is less time remaining to undertake other activities at the same time during the day. To enable a combination hot and normal

activity at the same time, e-JobPlan automatically shrinks the occurrences of the normal activity into the remaining available weeks of the job plan.

In the following example, two normal activities are scheduled at the same time of day – the first activity occurs on week one of a four week cycle, whilst the second activity occurs on weeks two, three and four. No shrinking needs to happen here as there is no overlap between the activities. The total number of delivered activities between 09:00 and 13:00 is 42 (10.5 + 31.5).

| Start | End | Activity | Num/Yr | Sess | Hrs/Wk | Hrs/Yr | |
|-------|-------|---------------------------------|--------|-------|--------|--------|---|
| 09:00 | 13:00 | Clinical diagnostic work (wk 1) | 10.5 | 0.250 | 1:00 | 42:00 |   |
| 09:00 | 13:00 | Operating sessions (wks 2-4) | 31.5 | 0.750 | 3:00 | 126:00 |   |

In the second example (Figure bellow), the first activity has now been labelled as hot thus increasing the number of occurrences per year to 13. Without shrinking the second activity, the total number of activities during the 09:00 – 13:00 time period would exceed the job plan’s weeks in attendance of 42. In this case, the second activity has been shrunk to fit into the remaining weeks in attendance, thus occurring on 29 occasions instead of its original 31. Again, the total number of delivered activities at this time has not exceeded 42 (13 + 29).

| Start | End | Activity | Num/Yr | Sess | Hrs/Wk | Hrs/Yr | |
|---|-------|------------------------------|--------|-------|--------|--------|---|
|  09:00 | 13:00 | HOT (wk 1) | 13 | 0.310 | 1:14 | 52:00 |   |
| 09:00 | 13:00 | Operating sessions (wks 2-4) | 29 | 0.690 | 2:46 | 116:00 |   |

4.6.4 Highlighting of activities shrunk by hot

Where hot activities cause the number of regular delivered activities to reduce, they are highlighted as ‘shrunk’ by an additional label.

| Start | End | Activity | Num/Yr | Sess | Hrs/Wk | Hrs/Yr | |
|---|-------|---|--------|-------|--------|--------|---|
|  09:00 | 13:00 | HOT - Consultant of the Week (wks 1-3 of 4 wks) | 39 | 0.929 | 3:43 | 156:00 |   |
|  09:00 | 10:00 | Admin other (please specify) (wks 1-4) | 3 | 0.018 | 0:04 | 3:00 |   |
|  10:00 | 11:00 | Audit (wks 1-4) | 3 | 0.018 | 0:04 | 3:00 |   |
|  11:00 | 13:00 | Endoscopy (wks 1-4) | 3 | 0.036 | 0:09 | 6:00 |   |
| Planned | | | 1.000 | | 4:00 | 168:00 | |

4.6.5 Hot activity cycle length display

In order to provide additional clarity to hot activities added to the routine work screen, e-JobPlan now displays the cycle weeks and cycle length after the activity name.

| Monday | | | | | | | | |
|--------|-------|------|---------------------------------|---------|---------|--------|--------|--------|
| Start | End | CRA | Activity | Num/Yr | Sess | Hrs/Wk | Hrs/Yr | |
| 09:00 | 13:00 | 0:00 | Hot week (wks 1,3,5,7 of 8 wks) | 26 | 0.619 | 2:29 | 104:00 | X |
| | | | | Totals: | Planned | 0.619 | 2:29 | 104:00 |
| | | | | | APA | 0.000 | 0:00 | 0:00 |
| | | | | | ATC | 0:00 | 0:00 | |

4.6.6 Preventing normal weekly timetabled activities from shrinking

There may be situations where hot and normal activities take place at the same time on the job plan, but with both taking equal precedence. In this scenario, it might not be desirable to have the normal activities shrunk at all if there are enough available weeks to accommodate both types of activity. It is therefore possible to indicate that non-hot activities should be unaffected by the inclusion of hot activities at the same time. An additional question will appear in the add activity panel asking whether hot activity can reduce the occurrence of this new activity.

Weeks worked
☐ 01
☐ 02
☐ 03
☐ 04
☐ ALL

Can hot activity reduce the occurrence of this activity?
☒ Yes
☐ No

In Figure below, we have an operating sessions activity that runs from 0900-1300 that has been marked as unaffected (UNA). When we add a hot activity at the same time, the unaffected non-hot activity retains its existing session value; however the administrative activity at the same has shrunk because it was not marked as unaffected.

| Start | End | Activity | Num/Yr | Sess | Hrs/Wk | Hrs/Yr | |
|-------|-------|--|--------|-------|--------|--------|---|
| 09:00 | 13:00 | Operating sessions (wk 1) | 10.5 | 0.250 | 1:00 | 42:00 | X |
| 09:00 | 13:00 | Administrative work directly related to clinical care (wk 2) | 5.5 | 0.131 | 0:31 | 22:00 | X |
| 09:00 | 13:00 | Consultant of the week (Hot) (wks 1-2) | 26 | 0.619 | 2:29 | 104:00 | X |

4.6.7 Multiple hot activities

It is possible to have multiple hot activities listed at the same time if their respective frequencies will not result in more occurrences than the job plan's weeks in attendance. In the extreme example below, three hot activities have been added at the same time on the same day each with its own prospective cover uplift. An additional normal activity has been added and then automatically shrunk by the system to occupy the remaining three available occurrences over the 42 week job plan.



| | Start | End | Activity | Num/Yr | Sess | Hrs/Wk | Hrs/Yr | |
|-----|-------|-------|---|--------|-------|--------|--------|-----|
| HOT | 09:00 | 13:00 | HOT (wk 1) | 13 | 0.310 | 1:14 | 52:00 | X ✎ |
| SHR | 09:00 | 13:00 | Administrative work directly related to clinical care | 3 | 0.071 | 0:17 | 12:00 | X ✎ |
| HOT | 09:00 | 13:00 | HOT (wk 2) | 13 | 0.310 | 1:14 | 52:00 | X ✎ |
| HOT | 09:00 | 13:00 | HOT (wk 3) | 13 | 0.310 | 1:14 | 52:00 | X ✎ |

4.6.8 Hot activities on no specified day or annualised

Hot activities occurring either on no specified day or entered as annualised will not attract a prospective cover factor, and no non-hot activities will shrink as a result.

4.7 Resources

The resources step allows you space to define any requirements you may have in order to deliver your job plan commitments under the themes of staff, equipment, clinical space and other. This step is optional and some organisations may have chosen to remove it from the job plan.

4.8 Summary

The summary step provides a breakdown of all the activities which have been added to the job plan split by category as well as Core, TCA or ATC classification.

| Category | Activity | Planned sessions | TCA sessions | Total sessions | Planned hours | TCA hours | ATC hours | Total hours |
|---------------|----------|------------------|--------------|----------------|---------------|-----------|-----------|-------------|
| + | DCC | 8.084 | 0.000 | 8.084 | 29:57 | 0:00 | 0:11 | 30:08 |
| + | SPA | 1.121 | 0.000 | 1.121 | 4:12 | 0:00 | 0:00 | 4:12 |
| + | ANR | 0.000 | 0.533 | 0.533 | 0:00 | 2:00 | 0:00 | 2:00 |
| + | PPS | 0.000 | 0.000 | 0.000 | 3:48 | 0:00 | 0:00 | 3:48 |
| + | MS | 0.356 | 0.000 | 0.356 | 1:20 | 0:00 | 0:00 | 1:20 |
| Grand Totals: | | 9.560 | 0.533 | 10.093 | 39:17 | 2:00 | 0:11 | 41:28 |

NB: Rounding to 3 decimal places may mean that there are small differences between totals and the detailed breakdown.

4.9 Finish

4.9.1 Request/accept sign off

The finish step of the job plan allows you to enter any additional comments about your job plan that your managers may find useful.

The finish step also includes buttons relating to the sign-off status of your job plan.

For job plans in the discussion stage (which are visible to both the doctor and their first sign-off manager) the options of request sign off or leave in discussion will be displayed. Clicking request sign off will alert your manager to the fact that you now deem your job plan to be complete, and gives them the opportunity to agree with this or not. By selecting leave in discussion you will be leaving your job plan in its current state so that either yourself or your first sign-off manager can make further changes.

For job plans in the draft stage the available options will be move to discussion or leave in draft. Move to discussion means that your first sign-off manager will be alerted to the fact that they can now view the contents of your job plan. Click leave in draft if you wish your job plan to remain private to you.

Note: Some organisations may choose to place a time limit on those job plans in the draft stage to ensure that the sign-off process does not stagnate. Depending on your notification settings, you will receive an automated alert informing you of the date that your job plan will automatically move into the discussion stage.

4.9.2 Agreeing with a request to sign off

If the request to sign off was created by your manager, you can either choose to **agree with job plan** to accept the sign off request, or **send back to discussion** to place it back into an editable format - you will be asked to give a reason for this before you can submit.

5 Other useful features

5.1 Printing and exporting your job plan

Selecting the **printable job plan** button from the **my job plan** screen will open a new window with a full job plan report. You can choose to export this to Microsoft Word by clicking **export to word** at the top right of the page or you can print directly from this page.

The printable job plan contains a summary of all your job plan details, including a week by week calendar summary of your routine work activities.

Wimbledon Hospital NHS Trust.

This job plan started 04 January 2013. Job plan for Dr B, Hannah in Haematology

Basic Information Show ☒

| | |
|--|------------------------|
| Job plan status | In 'Discussion' stage |
| Appointment | Full Time |
| Cycle | Rolling cycle - 1 week |
| Start Week | 1 |
| Report date | 24 Jan 2013 |
| Expected number of weeks in attendance | 42 |

The format of the timetable section within the printable job plan has been updated to provide an improved layout. In order to ensure the best use of space, the existing layout with fixed time blocks down the left-side of the page has been replaced with a flexible space where each activity is listed vertically underneath the last for each day of the week. This results in each week being far more condensed than it was previously, making it easier to see all activities one page. Where hot activities have been included on the job plan, they will display with green blocks in their own section above the weekly timetable with the relevant frequency information.

Timetable Show ☒

Legend: Direct Clinical Care (Blue), Supporting Professional Activities (Yellow), Additional NHS Responsibilities (Pink), External Duties (Orange), Fee Paying Services (Light Blue), Private Professional Services (Red), Medical School (Brown), Non-Working (Grey)

Week 1

| Monday | Tuesday | Wednesday | Thursday | Friday | Saturday | Sunday |
|--|---|---|---|---|----------|--------|
| MDT - Multi-disciplinary meetings about direct patient care 08:00 - 09:00 | Clinic - Rheumatology Outpatient 08:00 - 12:00 | Clinic - Rheumatology Outpatient 08:00 - 12:00 | Core SPA (Continuous Professional Development) 09:00 - 13:00 | Clinic - Rheumatology Outpatient 08:00 - 12:00 | | |
| Ward - General 09:00 - 11:00 | Admin - Patient Related 12:00 - 13:00 | Admin - Patient Related 12:00 - 13:00 | | Admin - Patient Related 12:00 - 13:00 | | |
| Admin - Patient Related 11:00 - 12:00 | Core SPA (Continuous Professional Development) 13:00 - 13:30 | Core SPA (Continuous Professional Development) 13:00 - 13:30 | | Core SPA (Continuous Professional Development) 13:00 - 13:30 | | |
| Core SPA (Continuous Professional Development) 12:00 - 12:30 | Ward - General 13:30 - 15:30 | Ward - General 13:30 - 15:30 | | Admin - Patient Related 13:30 - 14:30 | | |
| Ward - Referrals 12:30 - 13:30 | Admin - Patient Related 15:30 - 16:30 | Admin - Patient Related 15:30 - 16:30 | | Ward - General 14:30 - 16:30 | | |
| Procedures 13:30 - 17:30 | | | | | | |
| Admin - Patient Related 17:30 - 18:30 | | | | | | |

The job plan compare reports have also been updated to show the new timetable view, listing the newly added, revised and deleted activities in the same format.

5.2 Viewing your old job plans

The bottom right panel of the **my job plan** screen lists all of your historic job plans - click the relevant job plan to view a read-only version. The blue arrow on the left indicates which version you are currently viewing.

| Job plan library | | | |
|---------------------------|---|-------------|---------------------|
| Period | Current Stage | Level | Last Changed |
| > 14/10/2013 --> ongoing | In 'Discussion' stage | Dermatology | 13/07/2012 13:42:42 |
| 14/10/2012 --> 13/10/2013 | In 'Discussion' stage | Dermatology | 14/02/2012 12:03:00 |
| 01/08/2012 | In 'Discussion' stage - awaiting 1st sign-off agreement | Dermatology | 18/07/2012 11:28:16 |
| 14/10/2011 --> 13/10/2012 | Sign-off agreed | Dermatology | 14/10/2011 15:31:15 |

5.3 Setting your email alert preferences

The **preferences** link at the top of the screen lists the alerts which are generated by e-JobPlan, if any of these are selected then an email will be prompted each time the relevant action is performed. The final tick box at the bottom of the page will generate an email each time your 1st sign off manager makes a change to your job plan.

Change your preferences

Your job plan preferences

I would like to receive the following types of alert:

- ☐ when a manager sends a request to sign off a job plan.
- ☐ when a manager cancels a sign off request.
- ☐ when a manager rejects a sign off request.
- ☐ when a manager accepts a first sign off request.
- ☐ when a manager rejects a second sign off request.
- ☐ when a manager accepts a second sign off request.
- ☐ when a manager rejects a third sign off request.
- ☐ when a manager accepts a third sign off request.

I would like my alerts to automatically hide after:

☐ 2 months ☒ 3 months ☐ 4 months ☐ 5 months ☐ 6 months

Email preferences

☒ Send email to consultant when manager makes changes to a jobplan

5.4 Activities calendar

The activities calendar is an optional tool accessed from the **my job plan** screen – not all organisations make this available to all users. It's a useful way for both doctors and managers to see which activities are being carried out across each department, according to the information in the job plans.

Firstly, 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 doctors that you are interested in viewing, then **CLICK** to include them into the activity calendar.

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

The screenshot shows a two-panel interface for selecting doctors and viewing their job plans. Panel 1, titled '1. Select doctor names and click on arrow to include', contains a list of doctors: Dr Hall, Clare (SAS), Dr Lemond, Greg, Dr Merckx, Eddy, Dr Millar, Roger, Dr Skywalker, Anakin (highlighted), Dr Smith, Antony, Dr Taylor, Claire, Dr Toll, Lee, and Dr White, Betty. Below the list is a note: '* Press and hold the ctrl key to select multiple doctors.' Panel 2, titled '2. Doctors included in Activity Calendar', contains a table with columns: Name, Job Plan, Starting Week, and a Remove button. The table lists the following data:

| Name | Job Plan | Starting Week | |
|-----------------------|--------------------------|---------------|--------|
| Dr Depp, Johnny (SAS) | 01/07/2012 -> ongoing | 1 | Remove |
| Dr Harry, Leah | 13/10/2012 -> ongoing | 1 | Remove |
| Dr Johnson, David | 13/10/2012 -> 12/10/2013 | 1 | Remove |
| | 13/10/2013 -> ongoing | 1 | |
| Dr Kod, Marion (SAS) | 14/10/2011 -> ongoing | 1 | Remove |

A large black arrow with the word 'CLICK' points from the selection panel to the table. A 'Clear all' button is located at the bottom right of the table.

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 using the **remove** button.

Once the doctors have been chosen, you can specify the type of activities you would like to see from the activity filters. Select **update report** to populate the calendar with activities from the chosen job plans. Each time new activities or doctors are added, select **update report** to refresh the calendar. 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 |

[Update Report](#)

Activity report

30/12/2013 - 05/01/2014

Activity View Doctor View Day Week Timeline

| 30/12/2013 | 31/12/2013 | 01/01/2014 | 02/01/2014 | 03/01/2014 | 04/01/2014 | 05/01/2014 |
|--|--|---|---|--|------------|------------|
| 08:30 - 09:00 Administrative work | 08:15 - 13:00 Operating session - Other (please) | 08:30 - 13:00 Out-patient activities (please) | 08:30 - 09:00 Administrative work | 07:45 - 08:30 Travel time (please specify) | | |
| 09:00 - 12:00 Specialist clinic (please specify) | 09:00 - 11:00 Ward round other (please) | 08:30 - 13:00 Clinic - Combined | 09:00 - 10:30 Ward round - other (please) | 08:30 - 13:00 Operating session - Other (please) | | |
| 09:00 - 12:00 Clinic - Specialist | 13:00 - 17:00 Clinical diagnostic work (please) | 08:30 - 13:00 Clinic - Combined | 09:00 - 12:30 Clinic - pre-op assessment | 09:00 - 12:30 Specialist clinic (please specify) | | |
| 09:00 - 12:00 Clinic - Specialist | 14:00 - 17:00 Clinic - Combined | 08:30 - 13:00 Clinic - Combined | 09:00 - 12:30 Clinic - pre-op assessment | 09:00 - 12:30 Clinic - Specialist | | |

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.

Monday, January 07, 2013

Activity View Doctor View Day Week Timeline

all day

7 am

8 am Dr David Johnson

9 am

10 am Dr Johnny Depp

11 am

12 pm Dr Marion Kod

1 pm 08:15 - 13:00
Other patient treatment
Dr David Johnson

2 pm Dr Marion Kod



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