



# e-JobPlan

## A guide for Consultants and SAS Doctors

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# 1 Background

## 1.1 ABOUT THE SYSTEM

e-JobPlan, part of Allocate Software's Consultant Portal, 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.

In addition, as part of the Consultant Portal, it provides the ability for organisations to their medical HR administration relating to job planning, leave, appraisal and revalidation and 360 degree colleague and patient feedback all in one place.

## 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 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.

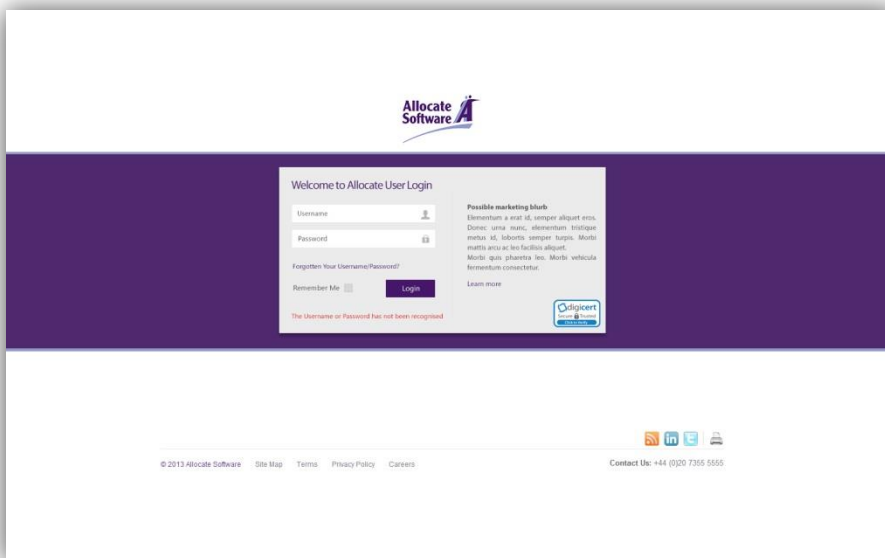
You can provide us with feedback at any time by clicking the **Feedback** link at the top of every page.

## 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.consultantdrportal.com](http://www.consultantdrportal.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).



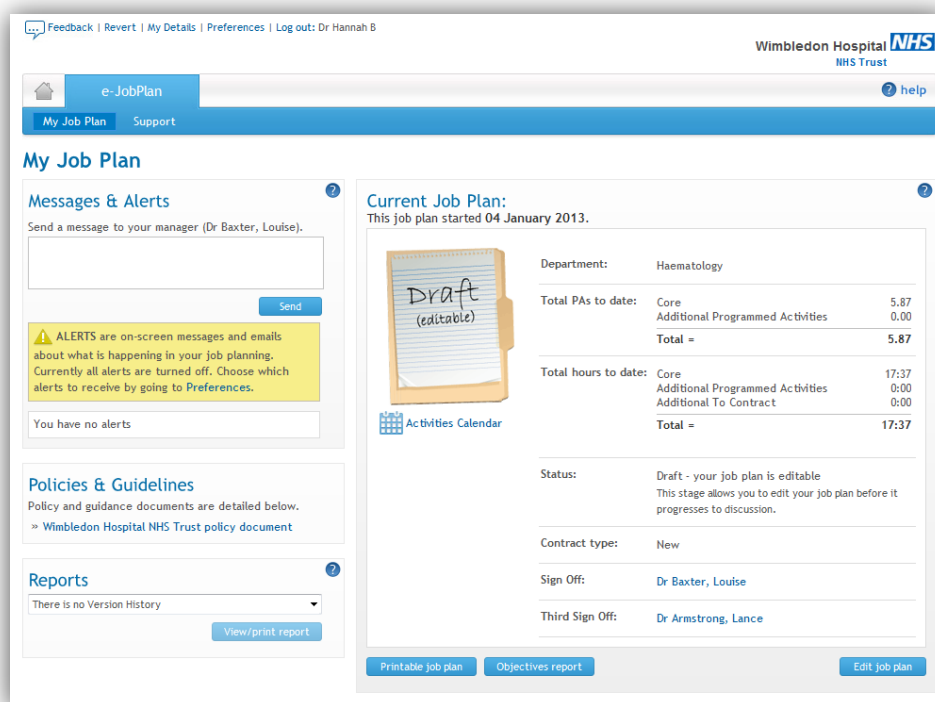
Enter your username and password into the login page which will look similar to the above. If you are logging in for the first time then you will be given a chance to update your personal details as well as being asked to change your password to something more memorable, you will not be able to move 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 to your account by your organisation's project manager or your own sign-off manager.



### 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"> <li>• Provides doctors with either a new blank job plan or a copy of a previous plan</li> <li>• Either the project manager (PM) or 1st sign-off manager can be nominated to publish</li> <li>• Doctor receive an automated email alert (where specified in trust settings)</li> <li>• Trust can choose to publish straight into either the draft or discussion stages</li> </ul>
Draft (optional)	<ul style="list-style-type: none"> <li>• Consultant only view of job plan which can be edited as required</li> <li>• Job plan does not feature on any reports</li> </ul>

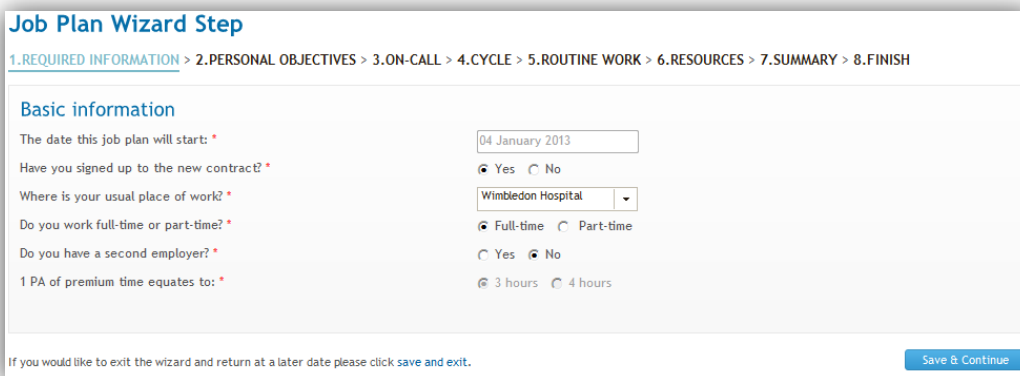
Discussion	<ul style="list-style-type: none"> <li>• Job plan visible by consultant and Trust.</li> <li>• The doctor or 1st sign-off manager can edit the job plan (with any changes visibly recorded)</li> <li>• Job plan visible in reports from this stage forward</li> <li>• Either party can request first sign-off</li> </ul>
1 <sup>st</sup> sign-off	<ul style="list-style-type: none"> <li>• Job plan no longer editable by either party</li> <li>• Electronic sign-off performed by nominated first sign-off manager</li> <li>• 1st sign-off manager or consultant can elect to push job plan back to discussion if necessary</li> </ul>
2 <sup>nd</sup> sign-off	<ul style="list-style-type: none"> <li>• Optional electronic sign-off performed by nominated second sign-off manager</li> <li>• 2nd sign-off manager can elect to push job plan back to discussion if necessary</li> </ul>
Signed off	<ul style="list-style-type: none"> <li>• Job plan completed and locked down</li> </ul>
Mediation	<ul style="list-style-type: none"> <li>• Optional stage to be used where either party disagree at first or second sign-off stages</li> <li>• Allows process to be tracked and relevant documentation to be attached</li> </ul>

## 4 Job Plan Wizard Steps

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 OBJECTIVES > 3. ON-CALL > 4. CYCLE > 5. ROUTINE WORK > 6. RESOURCES > 7. SUMMARY > 8. FINISH

**Basic information**

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

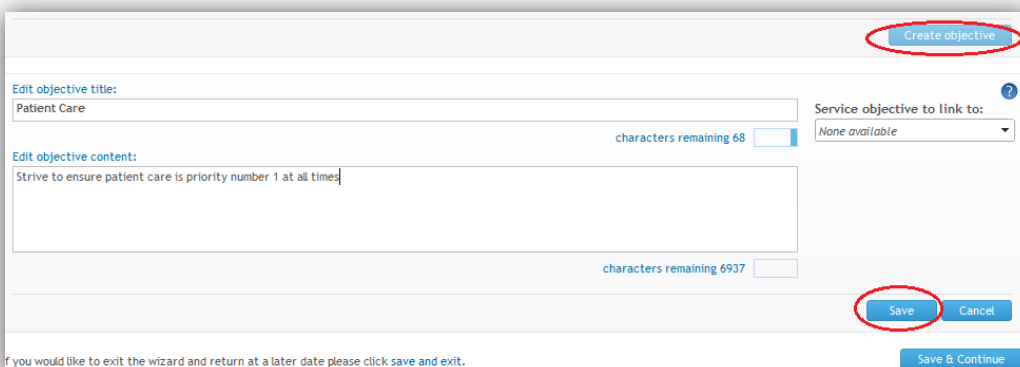
Do you have a second employer? \*  Yes  No

1 PA of premium time equates to: \*  3 hours  4 hours

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

### 4.2 PERSONAL OBJECTIVES

If enabled, objectives can be set at organisation, service (departmental) and personal level. Before creating your own personal objectives, it is important to review those set by the organisation and your own department so that your own objectives 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**.



Edit objective title:  characters remaining 68

Edit objective content:  characters remaining 6937

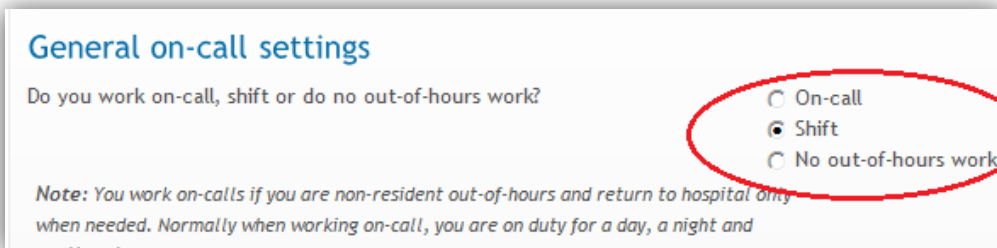
Service objective to link to:

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



### 4.3 SAS DOCTOR ON-CALL

SAS doctors have three options for their on call work; **on-call**, **shift** or **no out-of-hours work**. Definitions of on-call and shift work are provided when the relevant options are selected. On-call work is entered in the on-call screen as described in the following section. Where shift work is selected, this should be entered as a regular direct clinical care (DCC) activity on the **routine work** step of the job plan wizard. Under DCC, SAS doctors will find an activity labelled 'shift on a junior doctor rota'.



**General on-call settings**

Do you work on-call, shift or do no out-of-hours work?

On-call  
 Shift  
 No out-of-hours work

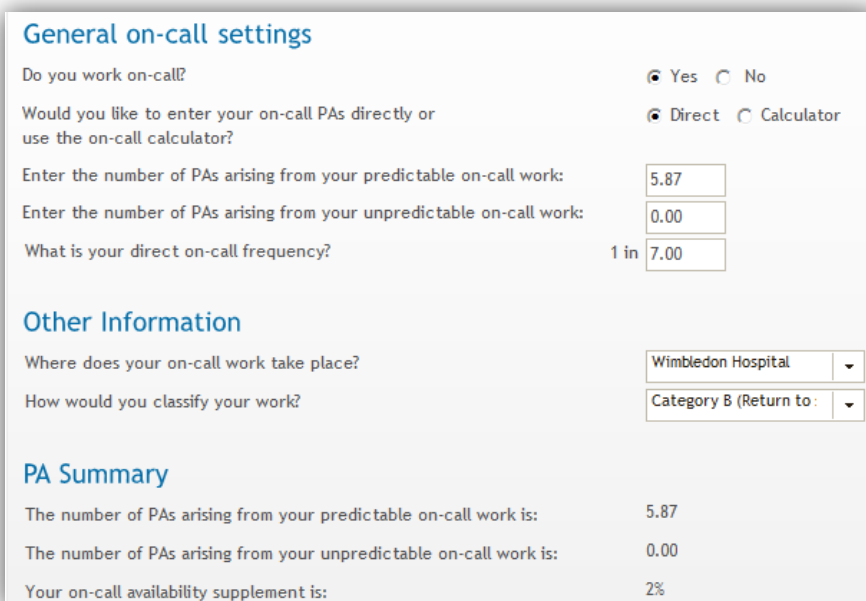
*Note: You work on-calls if you are non-resident out-of-hours and return to hospital only when needed. Normally when working on-call, you are on duty for a day, a night and another day.*

### 4.4 CONSULTANT DOCTOR ON-CALL

There are two types of method for entering on-call work: direct and calculator. The direct method is optional and some organisations may choose to disable this.

#### 4.4.1 Direct Method

The direct method requires the entry of the PA values themselves for both predictable and unpredictable on-call work. The PA summary section of the screen will calculate the on-call availability supplement based on the specified frequency and category. The direct method should only be used by doctors where they have a previously agreed or locally negotiated payment for on-call work.



**General on-call settings**

Do you work on-call?  Yes  No

Would you like to enter your on-call PAs directly or use the on-call calculator?  Direct  Calculator

Enter the number of PAs arising from your predictable on-call work:

Enter the number of PAs arising from your unpredictable on-call work:

What is your direct on-call frequency? 1 in

**Other Information**

Where does your on-call work take place?

How would you classify your work?

**PA Summary**

The number of PAs arising from your predictable on-call work is: 5.87

The number of PAs arising from your unpredictable on-call work is: 0.00

Your on-call availability supplement is: 2%

#### 4.4.2 Calculator Method

The calculator method automatically determines the PA value and on-call availability supplement based on the hours and frequencies entered for weekday and weekend work.

You can choose to specify whether any of the work takes place in premium time or on a specific day, as well as giving separate frequencies for weekends and weekdays. There is also the chance to state whether any of it replaces/runs concurrently with other work in the job plan; this will prevent the job plan from double counting work already detailed elsewhere in the job plan. Your first sign-off manager should be consulted if you have uncertainties about the information required here; they will help to ensure that there is consistency between those doctors that share the same on-call rota.

**Note: Details of how the calculations are made can be found in the Definitions and Calculations document in the support tab**

Would you like to enter your on-call PAs directly or use the on-call calculator?  Direct  Calculator

Do you work on-call at weekends?  Yes  No

Do you work a different on-call frequency at weekends?  Yes  No

#### Weekday predictable on-call work

What is your weekday on-call frequency? 1 in

What are your average hours of predictable emergency work per weekday on-call?  (hours : minutes)

How much of this work takes place between 19:00 & 07:00?  (hours : minutes)

Does this work replace or run concurrently with other activities?  Yes  No

#### Weekday unpredictable on-call work

What are your average hours of unpredictable emergency work per weekday on-call?  (hours : minutes)

How much of this work takes place between 19:00 & 07:00?  (hours : minutes)

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

#### Weekend on-call work

What is your weekend on-call frequency? 1 in

What are your average hours of predictable emergency work per weekend on-call?  (hours : minutes)

Does this work replace or run concurrently with other activities?  Yes  No

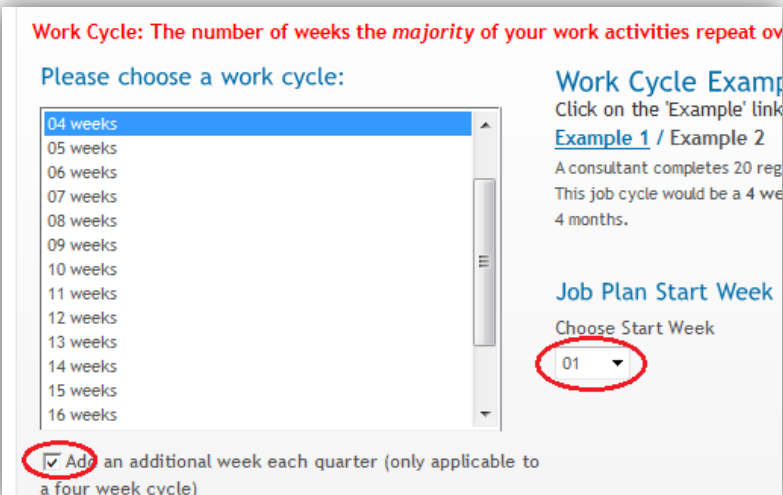
What are your average hours of unpredictable emergency work per weekend on-call?  (hours : minutes)

## 4.5 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.

**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 5<sup>th</sup> week each quarter by selecting 4 weeks from the cycle length and then ticking the additional week box at the bottom.



### 4.5.1 Job Plan Start Week

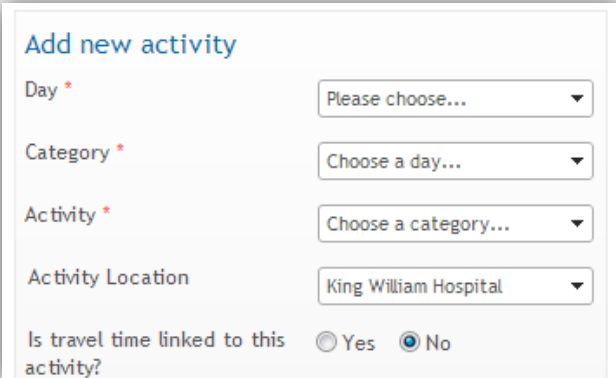
The **job plan start week** refers to the week of the cycle on which the start date of the job plan falls – this ensures that the activity calendar and the e-Leave module (where available) have accurate information.

## 4.6 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.

### 4.6.1 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.



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 <b>no specified day</b> .
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.

Premium time	Based on the start and finish time set in the previous field, the system will automatically determine the amount of premium time this spans.
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, APA (additional programmed activity) 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.


#### 4.6.2 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 PA 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.

### 4.6.3 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 PAs that the activity is worth based on the hours and number of weeks in attendance. Activities with a PA value shown in brackets mean that these do not contribute to the total PA 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.

Tuesday						
Start	End	Activity	Num/Yr	PA	Hrs/Wk	Hrs/Yr
09:00	10:00	BMT donor assessment clinic (wks 1-5)	42	0.25	1:00	42:00
11:00	12:00	Appraiser	12	0.07	0:17	12:00
12:00	14:00	MDT - other (wks 1-5)	42	0.50	2:00	84:00
Totals:			Core	0.32	1:17	54:00
			APA	0.50	2:00	84:00
			ATC		0:00	0:00

### 4.6.4 PA breakdown

The PA breakdown box underneath the add activity panel will show the total number of PAs 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 PA.

PA breakdown		
Totals PAs to date:	Core	7.44
	APA	0.50
	<b>Total =</b>	<b>7.94</b>
Total hours to date:	Core	23:54
	APA	2:00
	ATC	0:00
	<b>Total =</b>	<b>25:54</b>
Expected no. of weeks in attendance:		42
1 PA of premium time equates to:		3 hours

## 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, APA or ATC classification.

Category	Activity	Core PAs	APA PAs	Total PAs	Core hours	APA hours	ATC hours	Total hours
-	DCC	7.37	0.50	7.87	23:37	2:00	0:00	25:37
	BMT donor assessment clinic	0.25	0.00	0.25	1:00	0:00	0:00	1:00
	MDT - other	0.00	0.50	0.50	0:00	2:00	0:00	2:00
	Open access clinic	1.25	0.00	1.25	5:00	0:00	0:00	5:00
	Predictable Emergency Work	5.87	0.00	5.87	17:37	0:00	0:00	17:37
-	SPA	0.07	0.00	0.07	0:17	0:00	0:00	0:17
	Appraiser	0.07	0.00	0.07	0:17	0:00	0:00	0:17
Grand Totals:		7.44	0.50	7.94	23:54	2:00	0:00	25:54

## 4.9 FINISH

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

### 4.9.1 Request/accept sign off

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.

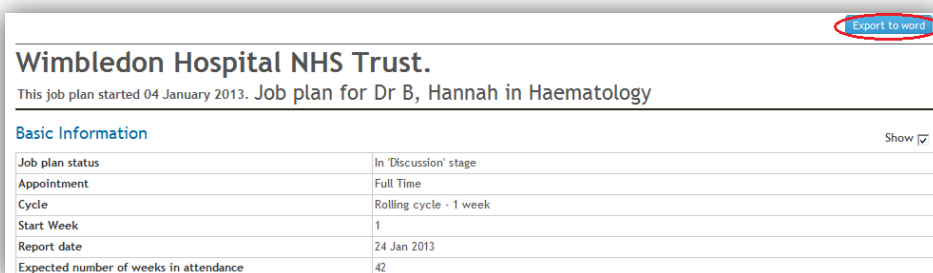


## 5 Other useful features

### 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.

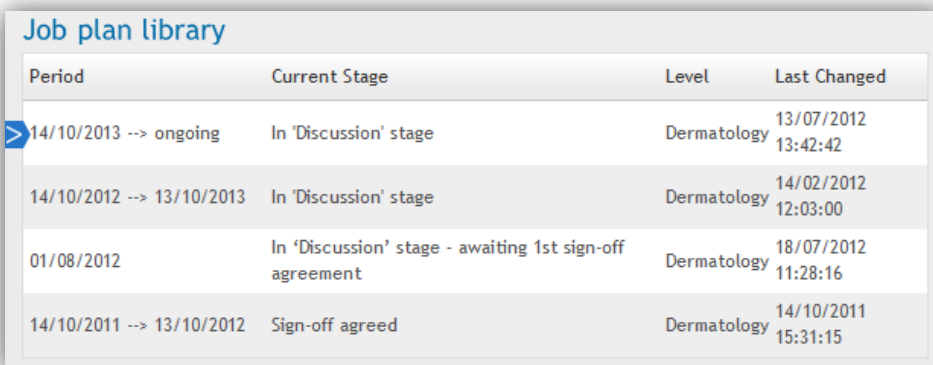
The printable job plan contains a summary of all your job plan details, including a week by week calendar summary of your routine work activities.



Basic Information		Show <input type="checkbox"/>
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	

### 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.



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 1<sup>st</sup> 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.*

1. Select doctor names and click on arrow to include

- Dr Hall, Clare (SAS)
- Dr Lemond, Greg
- Dr Merckx, Eddy
- Dr Millar, Roger
- Dr Skywalker, Anakin
- Dr Smith, Antony
- Dr Taylor, Claire
- Dr Toll, Lee
- Dr White, Betty

\* Press and hold the ctrl key to select multiple doctors.

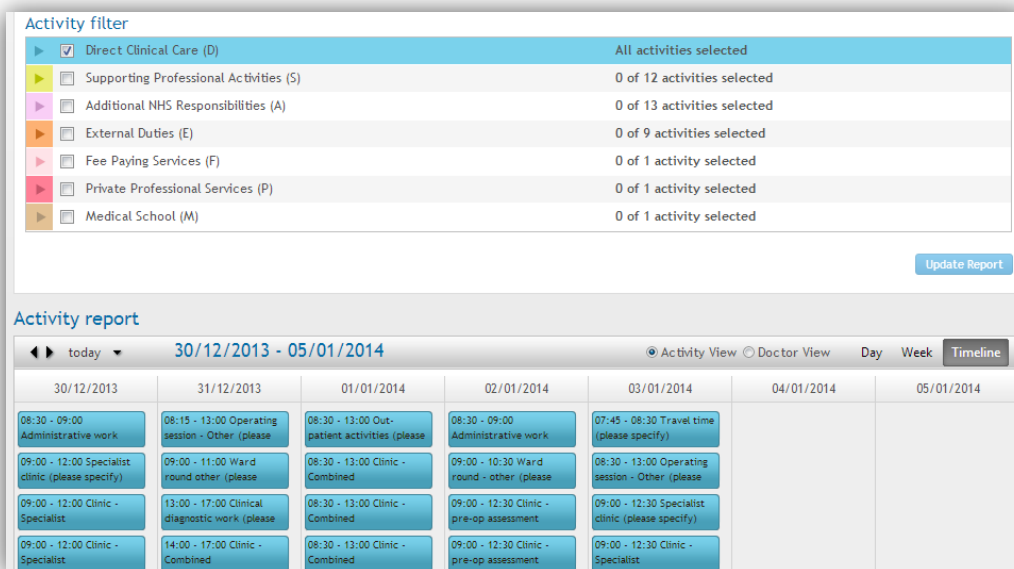
**CLICK** →

2. Doctors included in Activity Calendar

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

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.

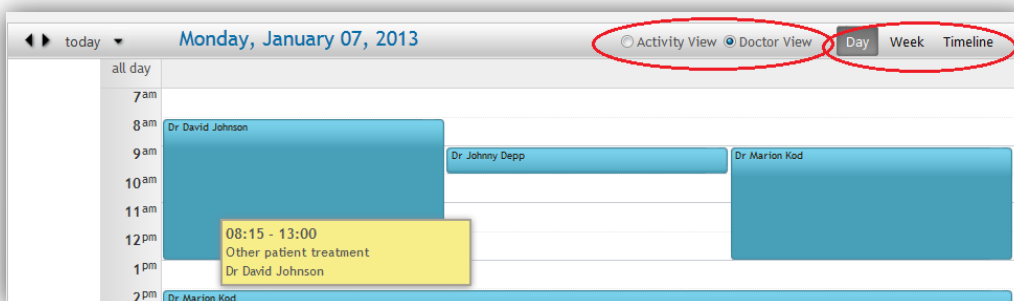


The screenshot shows the 'Activity filter' section with the following options and counts:

Activity Type	Count
<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

Below the filter is an 'Update Report' button. The 'Activity report' section shows a calendar view for the period 30/12/2013 to 05/01/2014. The view is currently set to 'Timeline' (indicated by a radio button). The calendar displays various activities such as 'Administrative work', 'Operating session - Other', 'Out-patient activities', 'Clinic - Combined', 'Ward round - other', 'Travel time', 'Operating session - Other', 'Specialist clinic', 'Clinical diagnostic work', 'Specialist', and 'pre-op assessment'.

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.



The screenshot shows the 'Activity report' interface for Monday, January 07, 2013. The view is currently set to 'Timeline' (indicated by a radio button). The calendar displays activities for three doctors: Dr David Johnson, Dr Johnny Depp, and Dr Marion Kod. The 'Activity View' and 'Doctor View' radio buttons are circled in red, as are the 'Day', 'Week', and 'Timeline' view buttons. A tooltip for Dr David Johnson shows an activity from 08:15 - 13:00 labeled 'Other patient treatment'.

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