



# **E-JOB PLAN USER GUIDE**

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## E-JOB PLAN USER GUIDE

### ENTERING YOUR DETAILED JOB PLAN



#### Logging In

- E-Job Plan is web based software that you can access from wherever you have an internet connection. Open a new browser window and navigate to <https://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.
- Log-in details will come from [noreply@healthmedics.allocatehealthsuite.com](mailto:noreply@healthmedics.allocatehealthsuite.com). This email will provide you with the web address, your personalised username and a temporary password for the E-Job Plan system (please contact the generic e-mail if this does not arrive: [ejobplan.admin@ggc.scot.nhs.uk](mailto:ejobplan.admin@ggc.scot.nhs.uk)).

#### Log In Screen

A screenshot of the HealthMedics Optima login interface. The background is a teal color. At the top left, there is a white circular icon containing a teal letter 'A', followed by the text 'HEALTHMEDICS OPTIMA' in white, uppercase letters. Below this, the title 'Login Details' is displayed in bold black text. There are three input fields: the first is labeled 'Your Username' with a person icon, the second is labeled 'Your Password' with a lock icon, and the third is a checkbox labeled 'Remember me'. To the right of the 'Remember me' checkbox is a teal 'Login' button. At the bottom left, there is a link that says 'Forgotten your username/password?' in teal text.

#### Dashboard

Upon logging in to E-Job Plan, you will be presented with your job planning dashboard.

The Dashboard has 2 tabs:

- My Job Plan – explained in more detail below.
- Support - The support tab will provide you with additional documents for your information and assistance.

## Setting up Preferences

Before you begin adding your Job Plan please choose the **Preferences** option at the top of the screen.



Please select “When a manager sends a doctor a request to sign-off a Job Plan”. This will allow you to receive alerts to your own email address when your Manager sends you a Job Plan sign-off request.

### Change your preferences

**Your job plan preferences**

I would like to receive the following types of alert:

- when job plan is in a stage and milestone is within a set period of time.
- when a job plan has not been modified for a specific period of time.
- when a doctor moves a job plan from draft into discussion.
- when a doctor sends a manager a request to sign off a job plan.
- when a manager sends a doctor a request to sign off a job plan.
- when a doctor cancels a sign off request.
- when a manager cancels a sign off request.

You may also want to scroll to the bottom of the page and deselect the option “Send e-mail to consultant when manager makes a change to a Job Plan”. If you do not deselect this option you will receive an alert to your own e-mail address every time your manager makes a change to the Job Plan. This can become very annoying if multiple changes are being made to the Job Plan that you are aware of.

### Email preferences

Send email to consultant when manager makes changes to a jobplan

*Please note: You will still receive alerts within the message centre in the system if changes are made to the Job Plan and you can track changes via the Change Report found in the My Job Plan tab:*

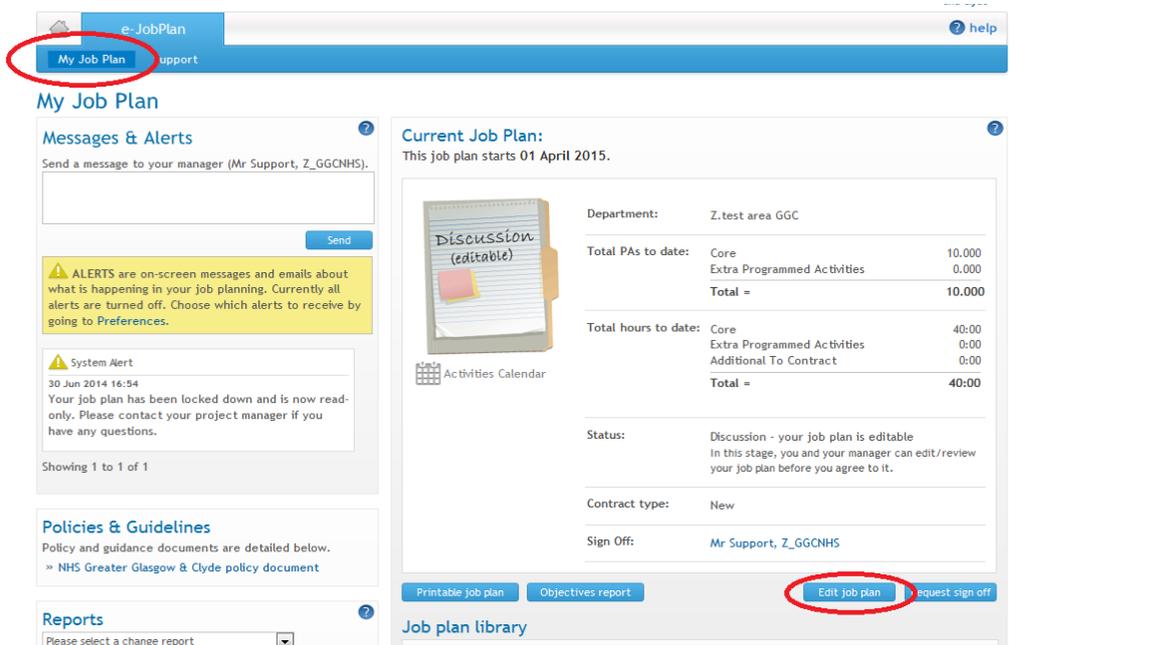
**Reports** ?

Please select a change report

Choose the **Save** button at the bottom of this screen, then the **back** button to take you back to the My Job Plan tab.

# Job Plan Wizard Steps

To begin entering your job plan select **Edit job plan** from the **My Job Plan** page, this will take you to the job plan wizard. The wizard contains 8 screens in which you will enter your Job Plan detail.



As you work your way through each screen within the Job Plan Wizard, you can gain further assistance/clarification by hovering over the questions.

## SCREEN 1 - REQUIRED INFORMATION

Your basic information has been entered here. There is just one question you need to confirm – Do you intend to undertake Private Practice? If yes then change the NO to YES. You will then be able to enter the detail of your Private Practice later within Screen 5. Please check this information is correct and press **Save and Continue**.

### Job Plan Wizard Step

[1.REQUIRED INFORMATION](#) > [2.PERSONAL OBJECTIVES](#) > [3.ON-CALL](#) > [4.CYCLE](#) > [5.ROUTINE WORK](#) > [6.RESOURCE](#) > [7.SUMMARY](#) > [8.FINISH](#)

The start date of this job plan has been set by your manager.

The date this job plan will start: 01 August 2018

Have you signed up to the new contract?  Yes  No

Where is your usual place of work? \*Queen Elizabeth Unit

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

Do you have an alternate employer?  Yes  No

Do you identify with any of the following?  
 Clinical Academic  
 Honorary Doctor  
 Locum Doctor  
 Military Doctor

Please provide the name of your university:

Do you undertake Private Practice?  Yes  No

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

How many weeks a year are you available for work? 42 weeks, 0 days

Use this section to upload additional files to support your job plan.  
  
No documents uploaded.

## SCREEN 2 - PERSONAL OBJECTIVES

Organisational objectives have been set and can be viewed on this page. If you wish to enter Personal Objectives please select **Create Objective**. Enter a title and content and once the details have been entered click **save**. You can copy and paste from another document if required. When completed click **Save and Continue**.

## SCREEN 3 - ON-CALL

Where applicable, this screen has been completed for you. If you agree and are happy with the information entered, click **Save and Continue**.

If you feel the information is not correct, please discuss with your Medical Manager. This will be picked up and discussed as part of the Job Planning sign-off process by your Medical Manager.

Rota Name	Location	Weekday Freq	Weekend Freq	Level	Supplement	PAs	Actions
Test rota	*Alan Lyell Centre for Dermatology (on-call base)	10	10	1	5%	0.000	X /

## SCREEN 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 should 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.

**Job Plan Wizard Step**

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

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

Please choose a work cycle:

- 02 weeks
- 03 weeks
- 04 weeks
- 05 weeks
- 06 weeks
- 07 weeks
- 08 weeks
- 09 weeks
- 10 weeks
- 11 weeks
- 12 weeks
- 13 weeks
- 14 weeks

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

**Work Cycle Examples**

Click on the 'Example' links below to see a cycle week example:

[Example 1 / Example 2](#)

A consultant completes 20 regular activities every 4 weeks and a further 3 activities every 4 months. This job cycle would be a 4 week job cycle with 3 additional flexible activities occurring 3 times a year or every 4 months.

**Job Plan Start Week**

Choose Start Week

01

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

[Save & Continue](#)

**Job Plan Start Week should be left at Week 1.**

**Note: If you choose to 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.**

## SCREEN 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.

### **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 \*

Category \*

Activity \*

Activity Location

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, in most cases there should be an "other" option. Please note in the comments your specific activity so it can be added in the future. <b>Note: Within the SPA menu there is an option for "Core SPA" This should be used to detail the time you spend on CPD, Appraisal, Job Planning and revalidation. No more than 4 hours per week (1PA) should be added for Core SPA. This may already have been added to your plan.</b>
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 "Other" and make a note of location in the comments box at the foot of the panel.
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.
Weeks worked	If you have selected a multiple week job plan cycle, you can indicate in which of the weeks this activity will be worked. An activity that occurs every week will have all of the available weeks selected.
Activity categorisation	You have the option to badge the activity as Core, EPA (Extra Programmed Activity) or ATC (Additional To Contract). These categorisations are defined when you hover your mouse over the field. <b>If you are unsure how to classify your work, select the default option of Core and then discuss this further with your medical manager.</b>
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.

### 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. This should be set to 42 weeks.

## 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 pencil at the right of the activity. 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 the **add** button once you have finished making any changes.

To delete an activity select the **cross** at the right of the activity. **Deleted activities cannot be retrieved.**

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	

## Travel Time

Time spent travelling in the course of fulfilling duties and responsibilities agreed in the Job Plan will be counted as part of the agreed PAs. All travel should be entered into the Job Plan including travel to and from base to other sites, travel between other sites and 'excess travel time'. Travel should be entered as a separate activity and NOT added to another activity as part of a session.

'Excess travel time' is the difference between the time spent travelling from home to base and home to other sites away from base.

Example 1: Home to base = 30mins, Home to Other Site = 1 hour, Difference = 30mins

Example 2: Home to base = 1 hour, Home to Other site = 30mins so no travel time due as there is no excess.

For more information on travel time entitlement please refer to the Job Planning policy.

Travel time should be entered separately and in addition to the activity it is related to using the same method noted above from entering a new activity. The location of the travel time should be set to the site you are travelling to and please also remember to add the locations you are travelling from and to in the comments box.

To calculate the excess travel time:

- Enter Home Postcode into Google along with Base name or Postcode to confirm the travel time to base, e.g. G61 1XX to G51 4TF
- Enter Home Postcode into Google along with Other Site name or Postcode to confirm the travel time to the other site, e.g. G61 1XX to G42 9LF
- If Home to Other site Travel time is greater, then deduct the Home to Base travel time to confirm the excess travel time.

## 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	

## SCREEN 6 – 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**.

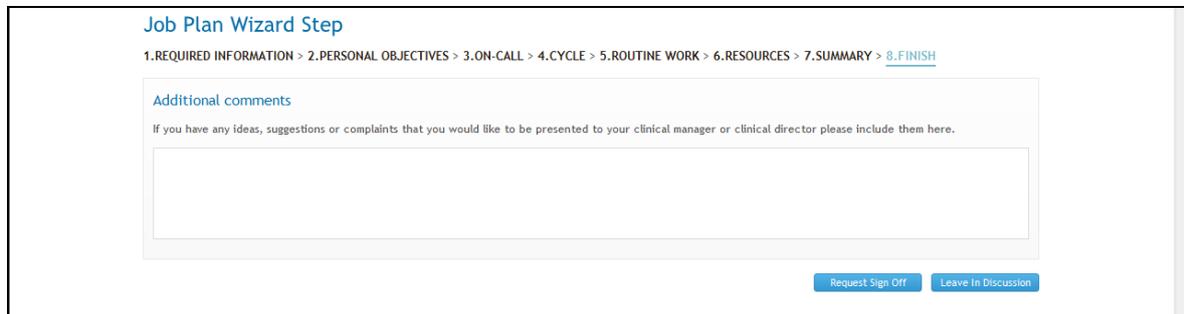
## SCREEN 7 – SUMMARY

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, EPA or ATC classification.

Summary of Programmed Activities								
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
	<b>Grand Totals:</b>	<b>7.44</b>	<b>0.50</b>	<b>7.94</b>	<b>23:54</b>	<b>2:00</b>	<b>0:00</b>	<b>25:54</b>

## SCREEN 8 - 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.



### Request 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 you and your Medical 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 you or your Medical Manager can make further changes.

### Accept Sign-off

If your Medical Manager has requested that you agree the Job Plan that has been added for you, access your Job Plan via the “My Job Plan” tab, scroll down to the bottom and click on the **View Job Plan** button. Work through the screens (as per information above) and if you are happy with the content, click **Finish** on Screen 8 and once back in the “My Job Plan” tab, click **Agree with Job Plan**.



Period	Current Stage	Level	Last Changed
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If you require to make changes to the Job Plan that has been entered click **Send back to discussion**, make the necessary changes and at Screen 8 **request Sign-off** to your Medical Manager.

If you require any assistance entering your Job Plan please do not hesitate to contact the E-Job Plan Project Team by emailing: [Ejobplan.admin@ggc.scot.nhs.uk](mailto:Ejobplan.admin@ggc.scot.nhs.uk)