

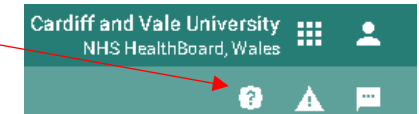
e-Job Plan - Quick Start Guide (e-Job Plan 11 mode)

Allocate e-Job Planning is a web based system that can be accessed from any Browser. Please go to www.healthmedics.allocatehealthsuite.com to access the Login Page.



Tip: You can also type 'My Job Plan' into the most search engines and it will take you to the URL above

This is only a quick overview of the job plan process. A more comprehensive guide can be found by clicking on the help icon and choosing the Policies and Guidelines section within e-Job Plan.



Enter your **Username** and **Password** (as provided in the welcome email). If you have forgotten any of these details please use the **Forgotten Username/Password option**.

You will be greeted with the screen below where you will see your current job plan summary, status of the job plan and your sign off managers.

Note: If your job plan has been issued blank it will show as below, however, your Clinical Director/Service Manager may have completed all or part of it for you.

Click on **Edit job plan**. This will take you through the various stages of creating your Job Plan. Any changes you make to a published job plan will be recorded so that they can be discussed with your sign-off manager.

The screenshot displays the e-Job Plan interface. On the left, the 'Job plan status' section shows 'In Discussion' with a start date of 08 Feb 2021. The 'Edit Job Plan' button is circled in red. Below this is the 'Basic Information' section with fields for Cycle, Weeks in Attendance (42 Weeks 0 Days), 1 PA of Premium Time (3 Hours), and Contract type (2003). On the right, the 'Summary' section shows a bar chart for 'Planned TCA' at 100%. Below the chart is a list of activity categories with their respective values:

Category	Value
DCC (Direct Clinical Care)	0.000
ED (External Duties)	0.000
SPA (Supporting Professional Activities)	0.000
FPS (Fee Paying Services)	0.000
ANR (Additional NHS Responsibilities)	0.000
PPS (Private Professional Services)	0.000
MS (Medical School)	0.000

1. General Information – Overview of your basic information



Tips: Choosing the correct place of work at this stage will mean that it defaults to that location on each activity (you can still change it if needed). If you work in 2 departments, you can use the 'Alternative Employer' option so that you can select that department when adding activities for that role.

1.General Information 2.Outcomes

Start date
08/02/2021

This is the date that you will start working your job plan. The start date will have been determined by your manager.

Employment

Contract version *
 Pre 2003 2003
Select the employment contract that you have signed up to.

Alternative employer *
 Yes No
Select Yes if you work for multiple employers.

Employment type *
 Full time Part time
Enter whether you work full time or part time in this organisation.

Medical title
 Clinical Academic
 Honorary Doctor
 Locum Doctor
 Military Doctor
Select an additional title if appropriate. If you select Clinical Academic or Honorary Doctor, enter your university name in the field below.

Usual place of work *
*University Hospital Llandough
Choose the location that you spend most of your time working at.

[Save and Continue](#)

2. Outcomes – Here you can create your own personal outcomes, see the Board Outcomes and/or any outcomes set by your department.

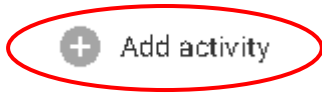
3. My Activities. This is broken into 3 sections – **Timetabled** **Flexible** **On-Call**

Add/Edit Work Cycle – Here will need to choose the number of weeks the majority of your activities repeat over.



TIP: if your plan covers a calendar month, please choose 4 weeks and tick the box for an additional week each quarter. You will also need to add the relevant week that the job plan starts.

Select **Add Activity**



Then choose whether it is a **Routine** activity or a **Hot** activity.

Add activity

This activity is *

Routine Hot

Build the activity by completing the required fields

Week: 1 - 5 of 5

Num/Yr: 42.00

Sessions: 1.267

Hrs/Wk: 4:45

Hrs/Yr: 199:30

This activity is *

Routine Hot

Activity details

Select a category *
Direct Clinical Care

Select an activity *
CW - Ward Round

Activity type *

Planned TCA

Can hot activity reduce the occurrence of this activity? *

Yes No

Activity occurrence

Day *
Monday

Start time *
08:00

Finish time *
12:45

Premium time = 0:00

Entry method *

Weekly timetabled Annualised

Worked in weeks *

All 1 2 3 4 5

Save

• **Flexible**

📅 Num/Yr: **12.00**

📅 Sessions: **0.286**

🕒 Hrs/Wk: **1:04**

🕒 Hrs/Yr: **45:00**

This activity is *

Routine Hot

Activity details

Select a category *
Direct Clinical Care

Select an activity *
MDT - Royal Gwent

Activity type *

Planned TCA

Activity occurrence

Total duration *
03:45

Number of delivered activities *
12

Flexible activity properties

This activity *

Is additional to work already timetabled in Job plan

Runs concurrently with work already timetabled in job plan

Replaces work already timetabled in job plan




Use this section for activities that are often not on a specific day. You will need to enter the duration of each individual session and the number of times you will deliver that annually.

You can then select whether it will be in addition to timetabled activities, in place of or run concurrently

Save

- **On Call** (Note: If your rota is not shown, please contact your departmental Super user or Clinical Director who can request that it is added for you)

Add On-call

 Sessions: **2.000**

Select On-call *

Cardiothoracic On Call 1:5

(Weekend is classed as Saturday to Sunday for this rota)

Entry method *

Rota by hours Rota by sessions

On-call location *

Intensity band *

Band 0 Band 1 Band 2 Band 3

Weekday work

Weekday frequency *

1 in 5

Predictable weekday sessions 1.000	Unpredictable weekday sessions 0.000
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Weekend work

Weekend frequency

1 in 5

Predictable weekend sessions 1.000	Unpredictable weekend sessions 0.000
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There are two ways to enter the On Call details – Hours or Sessions.

- The **hour's** entry method enables you to enter your on-call rotas using the known time spent performing predictable and unpredictable emergency work; from this, the system calculates the number of sessions.
- The **session's** entry method enables you to record your on-call rotas by entering a pre-defined session value.

Please note: In accordance with the Consultant contract in Wales, e-Job Plan automatically limits unpredictable on call work to a maximum of one sessions for each Consultant. Consultants are able to enter more than one session's worth of unpredictable work but only a maximum of one session will contribute to the job totals. All on-call hours will contribute to the job plan and reports regardless of the session limitation.

The unpredictable sessions limit applies only to Consultant roles.

Save

As you save each Activity it will build your job plan. Continue to add all your activities including any private work, university sessions and non-working sessions until you have completed the job plan.

Timetabled Summary

1. General Information			2. Outcomes				3. My Activities			
10.000 Planned Sessions	0.000 TCA Sessions	10.000 Total Sessions	<input checked="" type="checkbox"/> Timetabled <input type="checkbox"/> Flexible <input type="checkbox"/> On-call							
Week 1	08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00
Monday		Num/Yr: 22.62 PA: 0.538 OPD - GUCH 09.00 - 12.45 <input type="button" value="Planned"/>				Num/Yr: 22.62 PA: 0.538 CW - Imaging 13.30 - 17.15 <input type="button" value="Planned"/>				
Tuesday		Num/Yr: 42.00 PA: 1.000 Theatre - Cardiac Surgery 09.00 - 12.45 <input type="button" value="Planned"/>				Num/Yr: 42.00 PA: 1.000 Theatre - Cardiac Surgery 13.30 - 17.15 <input type="button" value="Planned"/>				
Wednesday		Num/Yr: 42.00 PA: 1.000 Advisory Committee Chair/Co-chair (HB Approved) 09.00 - 12.45 <input type="button" value="Planned"/>				Num/Yr: 42.00 PA: 1.000 CW - Imaging 13.30 - 17.15 <input type="button" value="Planned"/>				
Thursday		Num/Yr: 42.00 PA: 1.000 OPD - Thoracic Surgery 09.00 - 12.45 <input type="button" value="Planned"/>				Num/Yr: 42.00 PA: 1.000 Advisory Committee Chair/Co-chair (HB Approved) 13.30 - 17.15 <input type="button" value="Planned"/>				
Friday		Num/Yr: 42.00 PA: 1.000 CW - Imaging 09.00 - 12.45 <input type="button" value="Planned"/>				Num/Yr: 42.00 PA: 1.000 CW - Imaging 13.30 - 17.15 <input type="button" value="Planned"/>				

On Call Summary

1. General Information			2. Outcomes		3. My Activities		4. Finish
10.000 Planned Sessions	0.000 TCA Sessions	10.000 Total Sessions	<input type="checkbox"/> Timetabled <input type="checkbox"/> Flexible <input checked="" type="checkbox"/> On-call				<input type="button" value="+ Add On-call"/>
The total Sessions arising from your on-call work: 0.000		The total hours arising from your on-call work: 0:00		Highest on-call Band: 1			
Rota Name	Location	Weekday frequency	Weekend frequency	Band	Sessions:	Hours	
Acute Medicine Rota	*University Hospital Llandough	10	5	1	0.000	0:00	>
You can enter more than 1 session's worth of unpredictable on-call against each rota, but only 1 session of unpredictable on-call will be added and displayed against the job plan.							

4. Finish - When you have completed your job plan you can either Request sign off or Leave it in discussion mode. Once you request sign off, the Job Plan will be directed to your Manager and you will be notified of its progress.

1. General Information		2. Outcomes		3. My Activities		4. Finish	
<input type="button" value="!"/> If you have finished working on the job plan, please click on Request sign off. Clicking request sign off will alert the clinical user and gives them the opportunity to agree with this or not.							
						<input type="button" value="Request sign off"/>	<input type="button" value="Leave in discussion"/>