
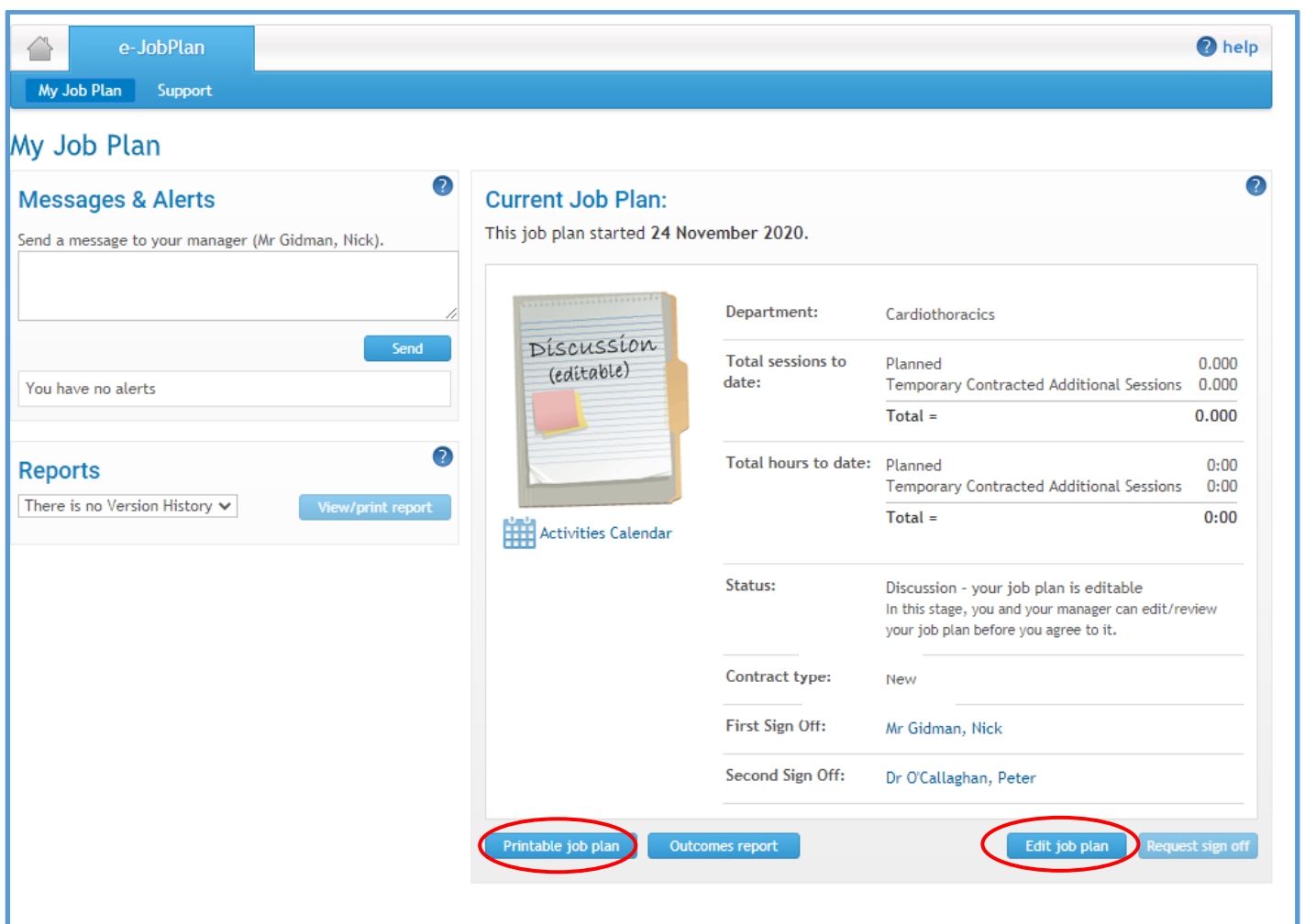


Allocate e-Job Planning is a web based system that can be accessed from any Browser. Please go to [www.healthmedics.allocatehealthsuite.com](http://www.healthmedics.allocatehealthsuite.com) to access the Login Page.

 Tip: You can also type 'My Job Plan' into any search engine or browser and it will take you to the URL above 😊

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.
- The messages section will keep you in touch with your manager and highlight any alerts.
- You will see your current job plan summary, status of the job plan and your sign off managers
- 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**, or if you would like to review it you can click on **Printable job plan**.



The screenshot shows the 'My Job Plan' dashboard. On the left, there are sections for 'Messages & Alerts' (with a 'Send' button) and 'Reports' (with a 'View/print report' button). The main area is titled 'Current Job Plan:' and shows a job plan that started on 24 November 2020. It includes a 'Discussion (editable)' icon, an 'Activities Calendar' icon, and a table of session and hour data. At the bottom, there are buttons for 'Printable job plan', 'Outcomes report', 'Edit job plan', and 'Request sign off'. The 'Printable job plan' and 'Edit job plan' buttons are circled in red in the original image.

**Current Job Plan:**  
This job plan started 24 November 2020.

Department: Cardiothoracics

Total sessions to date:	Planned	0.000
	Temporary Contracted Additional Sessions	0.000
	<b>Total =</b>	<b>0.000</b>

Total hours to date:	Planned	0:00
	Temporary Contracted Additional Sessions	0:00
	<b>Total =</b>	<b>0:00</b>

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 Gidman, Nick

Second Sign Off: Dr O'Callaghan, Peter

Buttons: Printable job plan, Outcomes report, Edit job plan, Request sign off

## Editing Job Plan – Job Plan Wizard (This will take you through the various stages of the Job Plan)

### 1. Required Information – Overview of your basic information



Tip: Choosing the correct place of work will mean that it defaults to that location on each activity.

e-JobPlan

My Job Plan Support

### Job Plan Wizard Step

1. [REQUIRED INFORMATION](#) > 2. [PERSONAL OUTCOMES](#) > 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 an alternate employer?  Yes  No

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.

No documents uploaded.

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

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

### Job Plan Wizard Step

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

Job Plan Outcomes

Personal Outcomes are individual doctor's personal goals for the coming year in order to contribute to the department's service outcomes.

No outcomes have been provided by your department.  
[Click to view Board outcomes](#)

### 3. On Call – Please add your on call rota here. 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.

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.

## On-call rota details (hours entry)

**General information**

On-call name:

On-call location:

On-call intensity band:

**Weekday work**

Weekday frequency: 1 in

Specific day for on-call work:

Weekday average hours:  *Predictable*  *Unpredictable*

**Weekend work**  
(A weekend is classed as Saturday to Sunday for this rota)

Weekend frequency: 1 in

Weekend average hours:  *Predictable*  *Unpredictable*

**Other information**

Related outcome:

Comments:

Click Save

e-JobPlan help

My Job Plan Support

### Job Plan Wizard Step

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

On-call Rotas Add Rota by Hours Add Rota by Sessions

Rota Name	Location	Weekday Freq	Weekend Freq	Band	Sessions	Actions
Acute Medicine Rota	*University Hospital Llandough	10	5	1	0.000	

On-call Summary

The total sessions arising from your on-call work is: 0.000

Highest on-call Band: 1

*i* 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.

**Reason for change**

Please let Mr Gidman, Nick know why you are making these change(s) and then click save and continue.

Test data - Kirsten Mansfield

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

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Save & Continue to go to Cycle

4. **Cycle** – Here you can choose the number of weeks the majority of your activities repeat over. Note: if your plan covers a month, please choose 4 weeks and tick the box for an additional week each quarter.

5. **Routine Work** – This is where you can build your job plan day by day by completing the following sections:
- Day
  - Category
  - Activity
  - Location
  - Days, Weeks and Times that it occurs.

Activities can be added as annualised or weekly timetabled. You will have the option to link it to an outcome and you can also add activities for other organisations/employers' or even other departments. You will need to specify if the activity is a 'Hot' activity and whether it is planned or Temporary Contracted. Click on 'Add' when each activity is completed and it will assign it to the relevant day and build the job plan.

The different activities will be colour coded and



Tip: If you tick '**Remember settings for next activity**' it will save the details so you can just edit the day, time or location etc. This is useful for adding a 'Hot Week', where you will have to add the activity for each day of that week/period.

My Job Plan Support

## Job Plan Wizard Step

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

**Add new activity**

Day \*

Category \*

Activity \*

Activity Location

Is travel time linked to this activity?  Yes  No

From:

To: (Activity location)

Then to:

Start (hh:mm)

End (hh:mm)

How would you like to enter this activity? \*  Weekly Timetabled  Annualised

Weeks worked  01  02  03  04  05  ALL  
*Week 5 occurs once every quarter.*

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

Categorise activities as:  Planned  TCA

Link Outcome

Employer

Comments

Remember settings for next activity

**Monday**

Start	End	Activity	Num/Yr	Sess	Hrs/Wk	Hrs/Yr
You have not added any activities for this day.						

**Tuesday**

Start	End	Activity	Num/Yr	Sess	Hrs/Wk	Hrs/Yr
You have not added any activities for this day.						

**Wednesday**

Start	End	Activity	Num/Yr	Sess	Hrs/Wk	Hrs/Yr
You have not added any activities for this day.						

**Thursday**

Start	End	Activity	Num/Yr	Sess	Hrs/Wk	Hrs/Yr
You have not added any activities for this day.						

**Friday**

Start	End	Activity	Num/Yr	Sess	Hrs/Wk	Hrs/Yr
You have not added any activities for this day.						

**Saturday**

Start	End	Activity	Num/Yr	Sess	Hrs/Wk	Hrs/Yr
You have not added any activities for this day.						

**Sunday**

Start	End	Activity	Num/Yr	Sess	Hrs/Wk	Hrs/Yr
You have not added any activities for this day.						

**No specified day**

Time	Activity	Num/Yr	Sess	Hrs/Wk	Hrs/Yr
You have not added any activities for this day.					

**On-call (Unspecified Weekday, Weekend)**

Type	Time	Sess
Acute Medicine Rota	0:00	0.000
		0.000

- Additional NHS Responsibilities
- Direct Clinical Care
- External Duties
- Fee Paying Services
- HOT Hot Activity
- TCA Temporary Contracted Additional Session
- Medical School
- Non-Working Time
- Private Professional Services
- Supporting Professional Activities
- SHR Shrunk by hot activity
- UNM Unaffected by hot activity
- New/Modified Activity
- Edit Activity

As you save each Activity it will build your job plan.

My Job Plan Support

## Job Plan Wizard Step

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

**Add new activity**

Day \*

Category \*

Activity \*

Activity Location

Is travel time linked to this activity?  Yes  No

**Monday**

Start	End	Activity	Num/Yr	Sess	Hrs/Wk	Hrs/Yr
09:00	12:45	OPD - GUCh (wks 1,3,5)	22.62	0.538	2:01	84:48
Totals:			Planned TCA	0.538 0.000	2:01 0:00	84:48 0:00

**Tuesday**

Continue to add all your activities including any private work, university sessions and non-working sessions until you have completed the job plan.

Day: Please choose...

Category: Choose a day...

Activity: Choose a category...

Activity Location: \*University Hospital Llandough

Is travel time linked to this activity?  Yes  No

From: No journeys available

To: (Activity location) \*University Hospital Llandough

Then to: No journeys available

Start (hh:mm):

End (hh:mm):

How would you like to enter this activity?  Weekly Timetabled  Annualised

Weeks worked:  01  02  03  04  05  ALL  
Week 5 occurs once every quarter.

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

Categorise activities as:  Planned  TCA

Link Outcome: Choose a category...

Employer: Cardiff and Vale University

Comments:

Remember settings for next activity

Cancel Add

Start	End	Activity	Num/Yr	Sess	Hrs/Wk	Hrs/Yr
09:00	12:45	MDT - Cardiac Surgery (wks 2,4)	19.38	0.462	1:44	72:42
09:00	12:45	OPD - GUCH (wks 1,3,5)	22.62	0.538	2:01	84:48
13:30	17:15	Research - Other (wks 2,4)	19.38	0.462	1:44	72:42
13:30	17:15	CW - Imaging (wks 1,3,5)	22.62	0.538	2:01	84:48
<b>Totals:</b>			Planned TCA	2.000 0.000	7:30 0:00	315:00 0:00

**Tuesday**

Start	End	Activity	Num/Yr	Sess	Hrs/Wk	Hrs/Yr
09:00	12:45	Theatre - Cardiac Surgery (wks 1-5)	42	1.000	3:45	157:30
13:30	17:15	Theatre - Cardiac Surgery (wks 1-5)	42	1.000	3:45	157:30
<b>Totals:</b>			Planned TCA	2.000 0.000	7:30 0:00	315:00 0:00

**Wednesday**

Start	End	Activity	Num/Yr	Sess	Hrs/Wk	Hrs/Yr
09:00	12:45	Teaching - Clinical Supervisor (wks 1-5)	42	1.000	3:45	157:30
13:30	17:15	CW - Imaging (wks 1-5)	42	1.000	3:45	157:30
<b>Totals:</b>			Planned TCA	2.000 0.000	7:30 0:00	315:00 0:00

**Thursday**

Start	End	Activity	Num/Yr	Sess	Hrs/Wk	Hrs/Yr
09:00	12:45	OPD - Thoracic Surgery (wks 1-5)	42	1.000	3:45	157:30
13:30	17:15	Teaching - Postgraduate (wks 1-5)	42	1.000	3:45	157:30
<b>Totals:</b>			Planned TCA	2.000 0.000	7:30 0:00	315:00 0:00

**Friday**

Start	End	Activity	Num/Yr	Sess	Hrs/Wk	Hrs/Yr
09:00	12:45	CW - Imaging (wks 1-5)	42	1.000	3:45	157:30
13:30	17:15	CW - Imaging (wks 1-5)	42	1.000	3:45	157:30
<b>Totals:</b>			Planned TCA	2.000 0.000	7:30 0:00	315:00 0:00

**Session breakdown**

Total sessions to date:	Planned 10.000
	TCA 0.000
	<b>Total = 10.000</b>
Total hours to date:	Planned 37:30

## 6. Summary

### Job Plan Wizard Step

1.REQUIRED INFORMATION > 2.PERSONAL OUTCOMES > 3.ON-CALL > 4.CYCLE > 5.ROUTINE WORK > 6.SUMMARY > 7.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	Total hours
+	DCC	7.538	0.000	7.538	28:16	0:00	28:16
+	SPA	2.462	0.000	2.462	9:14	0:00	9:14
<b>Grand Totals:</b>		10.000	0.000	10.000	37:30	0:00	37:30

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

Total session value:

Continue