

## HR Medical and Dental Services (HRMDS)

### 1.0 Interim Job Plan Review Guidance

An employee's contract is based on the national terms and conditions for their particular post. Changes can be made to certain parts of the contract e.g. Job Plan, DCC/SPA split, EPA's, full-time to part-time, location of work provided that the correct process is followed. Contractual changes should normally be made through current process e.g. Annual Job Plan Reviews, Interim Job Plan Review, Non-DCC Procedure, Work/Life Balance Policy.

#### 1.1 Making Changes to a Contract Affecting Pay – LESS than 3 months (For example – additional session or oncall shift)

Where ad-hoc changes to a contract are made for a period of less than 3 months, e.g. additional hours or an on-call shift, hours should be claimed in line with Career Grade Additional Sessions Guidance and On-Call Guidance available on [Home - HR Medical and Dental Services](#)

#### 1.2 Making Changes to a Contract Affecting Pay – MORE than 3 months (For example – EPA change, additional role)

Out with the Annual Job Plan Review Process, an Interim Job Plan review must be completed on Allocate. In line with terms and conditions of service, this may be instigated at any time by the employer or the employee. Further guidance on the use of Allocate is available through eJobPlan – Complete User Guide.

Changes to pay will only be instigated on the completion of an Interim job plan review that has been fully signed off by all authorised signatories (i.e. Reviewer, Clinical Director and CMS/AMD).

The 'Changes to Contract Form' is no longer in use for Interim Job Plan Reviews. If received these will be rejected.

By completing/signing the job plan review the Medical Manager is verifying that:-

- Funding is confirmed as available through the Service Manager.
- Funding is confirmed as available through Management Accounts.
- If a reduction is backdated, the employee is aware of the overpayment. The Payroll department will confirm this with the employee.
- Where required approval is given through Medical Managers Forums (See below)

## 2.0 Medical Managers Forums

Within the Interim Job Plan Review Process there are a number of policy and process that require additional approval by medical managers: -

The following requests will only be accepted when approved through the Acute Medical Managers or HSCP Oversight forums. This is to ensure that a consistent approach is taken.

2.1 Non-DCC/SPA Requests

2.2 Work/Life Balance including Retire and Return, Career Break

2.3 Partial Retirement

(Further guidance below)

The relevant application process should be followed as detailed below and approved the process should be finalised by completing the Interim Job Plan Review on Allocate.

- <https://www.healthmedics.allocatehealthsuite.com/core>

### 2.1 Non-DCC Procedure

- Agreed through the Job Planning process.
- This process is completed through the Medical Manager/HSCP Oversight forums. Prior to the job plan being completed/signed off, the non-DCC application form must be completed by the Clinical Director and submitted to the appropriate CMS for consideration at the forum.
- [Home - HR Medical and Dental Services](#)

### 2.2 Work/Life Balance

- Covers various policies e.g. Flexible Working, Career Break, Retire and Return etc. Each policy is available on the following link. In some cases, the policy required may have legal deadlines that are required to be adhered to. It is the manager's responsibility to ensure that deadlines are met.
- Policy Link - [NHS Lanarkshire HR](#)

### 2.3 Partial Retirement

- If this is to be considered pensionable pay must be reduced by 10% in entirety. The employee and/or Clinical Director must seek this confirmation from the payroll department directly. If your clinical director is supportive proposals should be reviewed that will fit in with the workings of the department.
- A request must be made under the Flexible Work Pattern Policy through the Clinical Director.
- Policy Link - [NHS Lanarkshire HR](#)

## 2.4 Processing Changes

On final sign off of the Interim Job Plan Review an alert will be sent to HR Medical and Dental Services who will process the change on eESS for the Payroll department to process.

## 3.0 Additional Guidance

The following provides additional guidance to assist when completing job plan reviews.

### 3.1 Additional Policy and Process

#### 3.1.1 Service Level Agreement (SLA)

- SLA's are discussed and completed by local service for agreement and sign off via the Service Manager. When agreed changes must be made through an Interim Job Plan Review in line with the paragraphs above.
- If the SLA changes the DCC/Non-DCC split, this must proceed through the Non-DCC Procedure.
- [Home - HR Medical and Dental Services](#)

#### 3.1.2 Working Time Regulations Policy

- Sets out NHS Lanarkshire's position regarding working hours and the legal requirements.
- A maximum of 12 PA's should be in place. If exceeding this, it must only be for a temporary period and a maximum of 6 months. Should an extension beyond 6 months be required this must be raised through the Medical Managers/HSCP Oversight Forums.
- Policy Link - [NHS Lanarkshire HR](#)

### 3.2 Preparation Guidance (For Medical Managers)

- It is important to identify the change required and why this is needed. Discussions should take place with the relevant medical manager and service manager as appropriate.
- Evidence of the change should be gathered for discussion by the manager. This should also be kept as this may be required later in the process for any mediation or appeal.
- Discussions on the proposals should take place with management accounts by the manager to ensure that the budget is available to make the change.

### 3.3 Engaging with Employee's

- An Interim Job Plan Review can be instigated at any time by either the employer or employee.
- All changes must be discussed with the employee and medical manager involved. This could be an informal discussion or part of the job plan review process to review why the change is needed and the reasons for this.
- The employee should be able to raise any concerns over the changes being proposed and have the opportunity to provide other ideas and suggestions.

- The employee may want time to consider the change or discuss this further with their representative. They may also have other ideas to help support the change being made.
- There is a contractual notice period (Up to 3 months' notice), for any change being made. Separate agreement can be reached to reduce this where there is a business need.
- Where there is an agreement to move an employee to part-time, there is no guarantee of a return to full-time hours.

### **3.4 Agreeing the Change (For Medical Managers)**

When a change is agreed it is important that the following are notified by the manager as early as possible:-

- Medical Managers – For Acute, any change in DCC/SPA split must be agreed through the Chief of Medical Services/Associate Medical Director at the monthly medical manager's forum. For HSCP, a separate Oversight forum is in place to agree changes through the Associate Medical Directors. Employees will then be advised this has been agreed.
- Finance – For the correct allocation of budgets. It is the managers' responsibility to obtain this authorisation through the service manager and management accounts and provide evidence of this if required.
- HR – By updating an annual or interim job plan review, to ensure that the appropriate amendment to contract is made. HRMDS will also make the change through eESS (where assigned as the supervisor), where the employee can see any changes made.
- SSTS – Informing the individual that completes SSTS will ensure that the correct payment is being made. This will also ensure that any over or underpayments are kept to a minimum.
- Department – To ensure that local records are updated and clinical arrangements made in line with the changes.

### **3.5 When a Change is not agreed (For Medical Managers and Employees)**

In some cases, the employer or the employee may not agree to a change being made.

- For Job Plan Review
  - A mediation and appeals process is in place.
  - The eJobPlan – Complete User Guide should be followed to confirm on Allocate that the Interim Job Plan Review is in mediation or appeal.
- For Work/Life Balance Policy
  - Each individual policy will detail the next steps to take.

### **3.6 Additional Support**

Support can be sourced from your line manager or by contacting HR Medical and Dental Services (HRMDS) through [HR ServiceNow](#).