



# eJobPlan - Complete User Guide

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NHS LANARKSHIRE

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## Introduction

Allocate JobPlan (eJobPlan) is part of planning products from RLDatix which is a software suite being rolled out nationally across NHS Scotland. The suite also includes Allocate Optima (eRostering).

Allocate JobPlan allows for the creation and management of job plans for individuals who require these as part of their role.

Your first job plan on NHS Lanarkshire(NHSL) Allocate JobPlan will be published as a blank job plan template for you to complete. In future years, previous job plans may be copied and edited.

*Please be aware each Board has its own closed Allocate JobPlan system consequently any job plans you have completed in other Boards are not visible in the NHSL system. When moving Boards, you will therefore need to complete a blank job plan template.*

You will receive a user account for the system, this will be sent from [noreply@allocatehealthsuite.com](mailto:noreply@allocatehealthsuite.com) (please check your junk folders also). Log in details will be provided via Email. When you log into your account on the system a full list of definitions and calculations within the system can be found on the top bar by clicking on the “?” symbol highlighted in red and selecting “Policies and Guidelines”.



## 1. Getting Started

When your job plan is due for initial, annual or interim review, it will be published in Allocate JobPlan for you. This will be published by your first sign off manager.

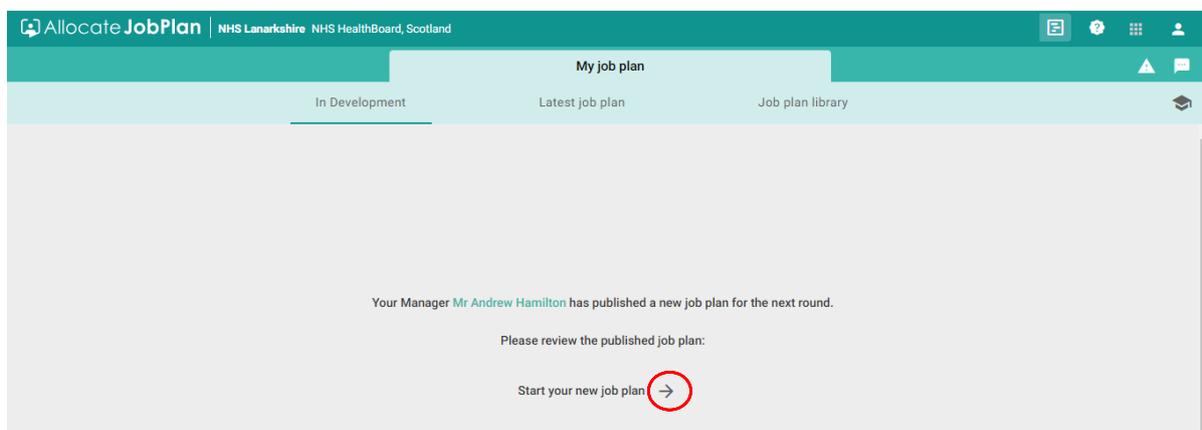
When you log in, you will be able to view your current and any past job plans that have been created on Allocate JobPlan within NHSL.

Your newly published job plan will be available under the “In Development” tab.

“Latest job plan” will show your most recent previous job plan created within Allocate JobPlan.

“Job plan library” will show all previous job plans created within Allocate JobPlan (NB only within current Board).

Click on the arrow highlighted to start your job plan.



From this screen you are able to view information that is currently held within your job plan.

This example is of a blank job plan as if you are a new start to NHSL. Your future draft job plans will have some information recorded on this screen and other screens as it is published using the previous year's job plan as a template.

Click Edit job plan

The screenshot displays the 'Allocate JobPlan' interface for NHS Lanarkshire. The page is titled 'My job plan' and has three tabs: 'In Development', 'Latest job plan', and 'Job plan library'. The 'In Development' tab is active. On the left, the 'Job plan status' section shows 'In Discussion' with a start date of '01 Apr 2024' and an end date of '-'. A red circle highlights the 'Edit Job Plan' button. Below this is the 'Basic Information' section, showing 'Weeks in Attendance' as '42 Weeks 0 Days'. On the right, the 'Summary' section shows a total of '0.0000' for 'Core' with a progress bar at '100%'. Below the summary are six categories with their respective values: DCC (Direct Clinical Care) 0.0000, ED (External Duties) 0.0000, SPA (Supporting Professional Activities) 0.0000, FPS (Fee Paying Services) 0.0000, ANR (Additional NHS Responsibilities) 0.0000, and PPS (Private Professional Services) 0.0000.

## 2. JobPlan - General Information Screen

### Within the General Information screen

Please ensure the start date for your annual job plan is set as 1<sup>st</sup> April, interim job plan start dates may of course differ and should be set as the same date the interim job plan has been re-published. Select your correct contract version, employment type, usual place of work, complete information regarding private practice or other employers, and select any additional title if relevant.

*Your job plan prior to 2023/2024, extracted from the old system, should be viewable as a PDF on this screen in the area highlighted.*

Then click “Save and Continue” on the bottom right of the screen.

The screenshot shows the 'Allocate JobPlan' interface for 'NHS Lanarkshire NHS HealthBoard, Scotland'. The user is logged in as 'User management'. The main heading is 'Manage job plans' with a sub-heading 'Demand and Team planning'. The user is 'Dr Test Example' and is on the '1. General Information' step of a 6-step process. The 'Start date' is 01/04/2024. The 'One premium hour PA equates' section has 'Three hours' selected. The 'Paid PA Value' field is empty. The 'Role' is 'Consultant' and the 'Department' is 'Test Admin'. The 'Employment' section has 'Employment type' set to 'Full time'. The 'Usual place of work' is set to 'Other'. The 'Private practice' is set to 'No'. The 'Availability' section has 'Other' selected. A red circle highlights the 'Other' section under 'Availability'. The 'Upload files' button is visible in the bottom right of the 'Availability' section.

### 3. JobPlan - Objectives Screen

#### Within the Objectives screen

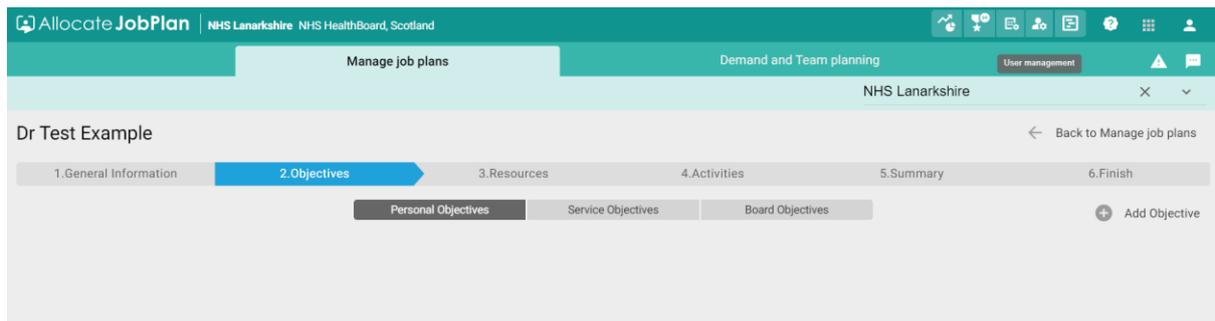
You should add/edit your personal objectives to your job plan and can also view the Board Objectives. Click “Save and Continue” on the bottom right of the screen.

The Board objectives have been added and are viewable under the corresponding tab. Service objectives can be added by the eJobPlan Project Team if provided. Personal objectives can be added by the individual/manager. These can be transferred over once a job plan has been completed on the Allocate JobPlan.

If the PDF of your previous job plan from the old system is available, you could refer to this and/or link to agreed generic objectives below.



Generic Objectives -  
Final Dec 2015.docx



## 4. Job Plan - Resources Screen (Optional)

### Within the resources screen

This section is optional and your job plan can be completed without completion.

You may however record the resources you currently access to support you with your job plan.

Please note, if you propose additional resources to complete your job plan, then a business case should be processed through your management structure.

The screenshot shows the 'Allocate JobPlan' interface for 'NHS Lanarkshire NHS HealthBoard, Scotland'. The main navigation bar includes 'Manage job plans', 'Demand and Team planning', and 'User management'. The current page is titled 'Dr Test Example' and features a breadcrumb trail: '1. General Information', '2. Objectives', '3. Resources' (highlighted with a blue arrow), '4. Activities', '5. Summary', and '6. Finish'. A 'Back to Manage job plans' link is visible in the top right. The '3. Resources' section contains three input fields: 'Staff', 'Equipment', and 'Clinical Space', each with a text area for recording resources.

## 5. Job Plan – Activities Screen

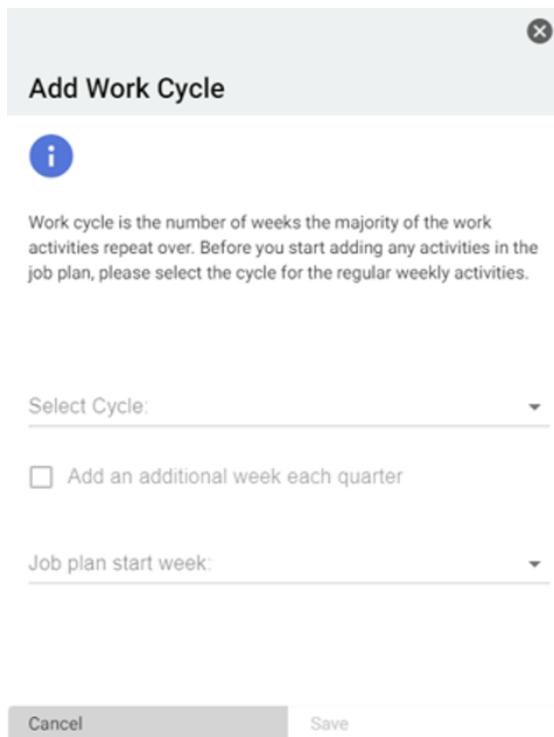
### Within the Activities screen

You will initially be asked to add your work cycle; this is highest cycle that your activities repeat over. i.e. If you have the same pattern each week, this should be 1-week cycle.

If you have a pattern that repeats every 4 weeks you would select a 4-week cycle

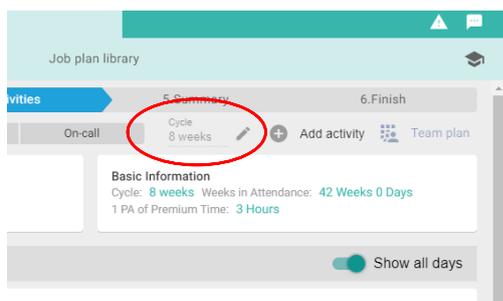
For demonstrative purposes the example below shows an 8-week cycle however this should always be selected as your largest cycle period.

The week beginning 1<sup>st</sup> April will become week 1 of your cycle, your job plan start week should be set to week 1 too. Click Save



The screenshot shows a dialog box titled "Add Work Cycle" with a close button (X) in the top right corner. Below the title is an information icon (i) and a paragraph of text: "Work cycle is the number of weeks the majority of the work activities repeat over. Before you start adding any activities in the job plan, please select the cycle for the regular weekly activities." There are three input fields: "Select Cycle:" with a dropdown arrow, a checkbox labeled "Add an additional week each quarter", and "Job plan start week:" with a dropdown arrow. At the bottom, there are two buttons: "Cancel" and "Save".

If you need to edit your cycle you can click on the pencil icon next to Cycle on the right



The screenshot shows the "Job plan library" interface. At the top, there are navigation icons for a triangle, a speech bubble, and a graduation cap. Below that, there are tabs for "On-call", "Cycle", "Add activity", and "Team plan". The "Cycle" tab is selected, and it shows "8 weeks" with a pencil icon next to it, which is circled in red. Below the tabs, there is a "Basic Information" section with the following text: "Cycle: 8 Weeks", "Weeks in Attendance: 42 Weeks 0 Days", and "1 PA of Premium Time: 3 Hours". At the bottom, there is a toggle switch labeled "Show all days" which is currently turned on.

## 6. Non-DCC Activity Guidance (Supporting Professional Activities and Other Roles)

Time spent on non-DCC activities such as SPA and other roles requires to be detailed in the job plan. Please refer to section 9 for examples of the type of work within each category.

All Consultants, Specialists and SAS Doctors have an allocation of SPA time provided for in their contracts. In general, the average full time Doctor will have one PA to cover SPA activities required for appraisal and revalidation. This is known as 'core SPA' in the eJobPlan system.

To apply for an increase in your non-DCC time you must follow Appendix D 'Non-DCC Guidance' and submit an application to your Clinical Director for onward transmission and approval. You cannot agree an increase to Non-DCC time in the Job Planning process without a formal request being made. If successful in requesting an additional role it should be detailed in the job plan as an EPA unless agreement has been received to commute a DCC to an additional role. Following the Medical Manager Forum/Area Oversight Group if additional non-DCC time is agreed, you will then receive a letter confirming the increase in SPA time. Your job plan should then be updated on Allocate JobPlan from the effective date of change.

Additional PA's for other SPA activity will only be allocated for those activities which fulfil the Board's guidance for other SPA activity. If you have additional PA's for SPA, you should detail the nature of the activity on your job plan such as 'Educational Supervision' and the PA value for it.

SPA activity should be conducted and timetabled as fully as possible in the eJobPlan.

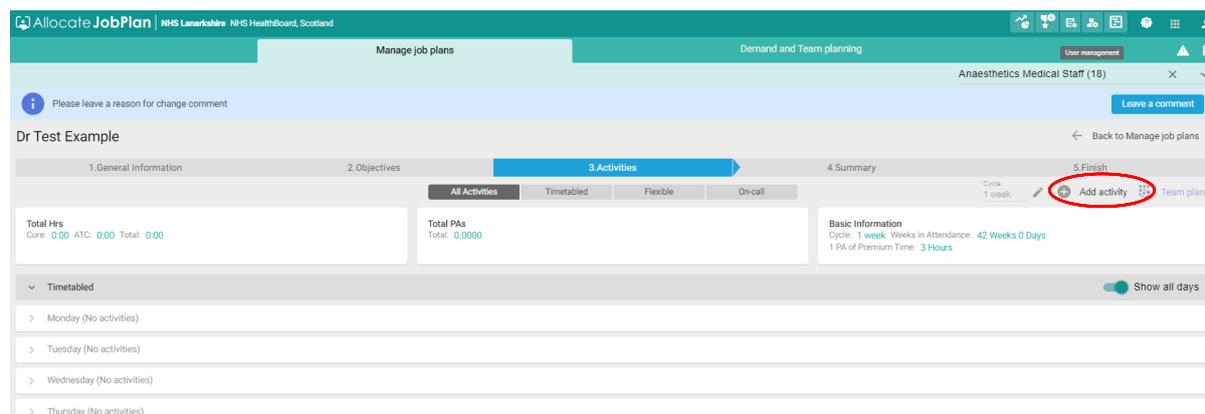
## 7. Adding Activities

### Within the Activities screen

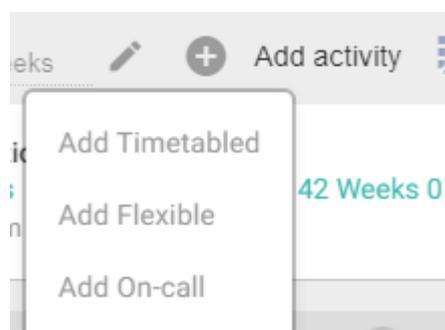
To add an activity, click “Add activity” highlighted below

All activities categories are added in the same way below i.e. DCC, SPA, Additional NHS responsibilities

This list available on [Page 26](#) may be able to help with Activity language and definitions



You should then select from Timetabled, Flexible or On-Call



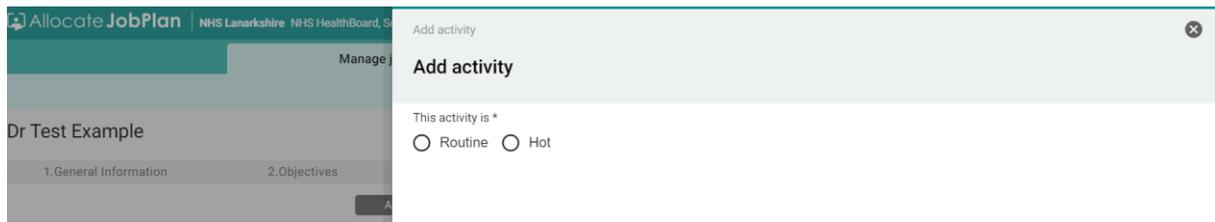
#### **For reference:**

*Timetabled – Activity that has a fixed time and day*

*Flexible – Activity that has no fixed time or day*

*HOT Activity – This is an activity that displaces other work that would normally be happening.*

*On-call – Programmed activities in the job plan for predictable and unpredictable emergency work(within DCC). Also, recognised by the payment of an on-call availability supplement.*



Hot Activities are enabled at a department level and are switched off by default. If required by your department, please ask your Clinical Director to contact the Project Team and to advise which activities are permitted as hot.

When enabled, all Timetabled or Flexible activity will require to be defined as “Routine” or “Hot”.

Using the tabs to the left, you can change the view to show only Timetabled, flexible or On-call activities.

*If you are within one of the specific tabs, it will only allow you to add activities of that type i.e. if viewing flexible tab and clicking add activity it will automatically try to add the activity as a flexible activity*

## 7.1 – Timetabled Activity

### Video Guide - [here](#)

Click on add activity and select Timetabled Activity, the next screen will have drop down options for you to select a category of activity and then the appropriate activity within that category.

*If there is any activity language omitted that you require, please discuss with your Clinical Director in the first instance and they may request additional criteria to be added to the system by the project team.*

### Non-DCC example

**Add activity**

Activity details

Select a category \*

Supporting Professional Activities

- Direct Clinical Care
- Supporting Professional Activities
- Additional NHS Responsibilities
- External Duties
- Fee Paying Services
- Private Professional Services
- Medical School
- Non-Working Time

Select an activity \*

- Appraisal (Own)
- Appraising Others
- Audit
- Clinical Management - Team Meetings
- Continuous professional development
- Core SPA
- Departmental Meeting
- Directorate Meeting
- Job Planning - Others
- Job Planning - Own
- Local Clinical Governance Lead

### DCC example

**Add activity**

Activity details

Select a category \*

Direct Clinical Care

- Direct Clinical Care
- Supporting Professional Activities
- Additional NHS Responsibilities
- External Duties
- Fee Paying Services
- Private Professional Services
- Medical School

Select an activity \*

- Admin - Patient Admin
- Admin - Rota Clinical Input
- MDT - Intensive Care Medicine
- OPD - Pain Clinic
- OPD - Preassessment Clinic
- Theatre - Cardiology
- Theatre - Community Dental

Remember these settings when selecting the 'Add & New' option

Cancel Add & New Save

You should then indicate if this is a core activity or ATC (Additional to contract), which day of the week the activity takes place along with the start and end times.

**For reference:**

*Core - A mandatory activity that is required to meet service targets and objectives. 10 PAs of core activity forms a standard full time contract.*

*EPA – Extra programmed Activity – these are additional agreed activities that have been agreed and subsequently have a PA value.*

*Additional to contract - An unpaid activity that does not accumulate any PA value. These activities may be used as evidence for Discretionary Points/Optional Points*

**Activity details**

Select a category \*  
Direct Clinical Care

Select an activity \*  
Admin - Patient Admin

Activity type \*  
 Core  ATC

**Activity occurrence**

Day \*  
\_\_\_\_\_

Start time \* \_\_\_\_\_ Finish time \* \_\_\_\_\_

Remember these settings when selecting the 'Add & New' option

Cancel Add & New Save

Following this, you should select if this activity is a weekly timetabled activity or annualised activity. If weekly is selected, and you have multiple weeks within your cycle, you should then select which weeks this activity occurs in. A new panel will now appear showing additional information based on the options chosen. Please see examples below.

Entry method \*  
 Weekly timetabled  Annualised

Day \*  
Monday

Start time \* 09:00 Finish time \* 13:00

Premium time = 0:00

Entry method \*  
 Weekly timetabled  Annualised

Worked in weeks \*



### Add activity

 Week: 1 - 8 of 8

 Num/Yr: 42.00

 PAs: 1.0000

 Hrs/Wk: 4:00

 Hrs/Yr: 168:00

Worked in weeks \*



 Week: 1 - 4 of 8

 Num/Yr: 21.00

 PAs: 0.5000

 Hrs/Wk: 2:00

 Hrs/Yr: 84:00

Worked in weeks \*



Finally, you should fill in the location information and then “Save” or “Add & New”

### Update – 12.12.2024

The latest update to Allocate JobPlan, now allows for activities to be added in blocks, when the activity is the same and takes place at the same time across multiple days.

As shown in the example below you can now choose multiple days for which an activity occurs. The example shown below shows a DCC Clinical Admin activity reoccurring on a Monday, Wednesday and Friday between the hours of 1300 - 1400.

Add activity

### Add activity

Week: 1 of 1

Num/Yr: 42.00 (126.00)

PAs: 0.2500 (0.7500)

Hrs/Wk: 1:00 (3:00)

Hrs/Yr: 42:00 (126:00)

---

**Activity details**

Select a category \*  
Direct Clinical Care

Select an activity \*  
Admin - Clinical Admin

Activity type \*  
 Core  EPA  ATC

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

---

**Activity occurrence**

Days \*  
 All  Monday  Tuesday  Wednesday  Thursday  Friday  Saturday  Sunday

Start time \*  
13:00

Finish time  
14:00

Premium time = 0:00 (0:00)

Entry method \*  
 Weekly timetabled  Annualised

Worked in weeks \*  
 All  1

Once added the activity will appear on each day that it occurs with a link symbol as shown below.

Monday

Start time	Finish time	Travel time	CRA	Category	Activity	Worked in weeks	Location	Num/Yr	PA	Hrs/Wk	Hrs/Yr
13:00	14:00	0:00	0:00	DCC	Admin - Clinical Admin	1	*University Hospital Wishaw	42.00	0.2500	1:00	42:00

This symbol can be clicked on the full block will appear as well as showing the values of this activity, again as shown below.

Block of Activities
✕

### Admin - Clinical Admin

Num/Yr: 126.00

PAs: 0.7500

Hrs/Wk: 3:00

Hrs/Yr: 126:00

**Monday**

Num/Yr: \_\_\_\_\_ 42.00

PAs: \_\_\_\_\_ 0.2500

Hrs/Wk: \_\_\_\_\_ 1:00

Hrs/Yr: \_\_\_\_\_ 42:00

Premium time: \_\_\_\_\_ 00:00

**Wednesday**

Num/Yr: \_\_\_\_\_ 42.00

PAs: \_\_\_\_\_ 0.2500

Hrs/Wk: \_\_\_\_\_ 1:00

Hrs/Yr: \_\_\_\_\_ 42:00

Premium time: \_\_\_\_\_ 00:00

**Friday**

Num/Yr: \_\_\_\_\_ 42.00

PAs: \_\_\_\_\_ 0.2500

Hrs/Wk: \_\_\_\_\_ 1:00

Hrs/Yr: \_\_\_\_\_ 42:00

Premium time: \_\_\_\_\_ 00:00

Close

By clicking elsewhere on the activity you can perform further actions, attempting to edit the activity will only affect the current one being viewed and will cause it to unlink from the block or the block can be edited as one provided the change will apply to all occurrences

### Admin - Clinical Admin

**DCC**

UNA Unaffected by hot activity

Core Core activity

Part of a Block

Week: 1 of 1

Num/Yr: 42.00 (126.00)

PAs: 0.2500 (0.7500)

Hrs/Wk: 1:00 (3:00)

Hrs/Yr: 42:00 (126:00)

This activity is \*

Routine  Hot

- Edit Activity
- Delete Activity
- Unlink Activity
- Edit Block
- Delete Block
- View Block

## 7.2 – Flexible Activity

**Video guide - [here](#)**

Flexible activities are added in the same way as Timetabled Activities , but have some different details to fill in:

- How long the activity lasts in hours
- How many of those are premium hours
- And how many times this activity is completed in the year.

### Activity occurrence

Total duration \*

\_\_\_\_:\_\_\_\_

Number of premium hours

\_\_\_\_:\_\_\_\_

Number of delivered activities \*

\_\_\_\_

In addition, the properties of the flexible activity should be added:

- Additional to work that's timetabled
- Runs concurrently (at the same time) as timetabled work
- Replaces timetabled work

### 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

## 7.3 – On-Call Activity

**Video Guide - [here](#)**

Click “Add activity”, then click “Add On-Call”

Firstly you should select the relevant rota, this will be determined by whether Friday is included as part of the “weekend” for your department/specialty.

You will now have the option to complete your On-Call section in **Hours** or **PA's**

### **By Hours**

Then you should fill in the required fields of:

- Location
- Level
- Frequency (number of doctors on the on-call rota)
- Hours(predictable and/or unpredictable)
- Premium time(if required)

When complete click “Save”.

The system will calculate totals for hours and PA’s as well as which supplement applies.

An example has been added on the next page.

Add On-call

### Add On-call

 PAs: **1.9995** 

 Hours: **8:00**

 Availability supplement: **5.00%**

Select On-call \*

On-Call Weekday Covers Mon-Thurs (Weekend is classed as Fri-Sun)

*(Weekend is classed as Friday to Sunday for this rota)*

Entry method \*

Rota by hours  Rota by PAs

On-call location \*

\*University Hospital Hairmyres

Level \*

Level 1 (Attend a place of work immediately or undertake analogous interventions)

Level 2 (Attend a place of work later or non-complex telephone)

#### Weekday work

Weekday frequency \*

1 in 10

Weekday frequency including prospective cover:

**8.07**

**Medium frequency**

Day

No fixed day

#### Predictable hours

Predictable weekday on call hours

**16:09**

Will all or some of this work be done in premium time?

Yes  No

## For PAs

Similarly, to adding in hours, you select the option for PAs and then complete the other required fields.

Allocate JobPlan | NHS Lanarkshire NHS HealthBoard, Scotland

Manage job plans

Please leave a reason for change comment

Dr Test Example

1. General Information 2. Objectives

All Activities

Total Hrs  
Core: 0:00 EPA: 0:00 ATC: 0:00 Total: 0:00

Total PA  
Core: 0

Timetabled

Monday (No activities)

Tuesday (No activities)

Add On-call

User management

Add On-call

Select On-call \*

On-Call Weekday Covers Mon-Thurs (Weekend is classed as Fri-Sun)

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

Entry method \*

Rota by hours  Rota by PAs

On-call location \*

\*University Hospital Hairmyres

Level \*

Level 1 (Attend a place of work immediately or undertake analogous interventions)

Level 2 (Attend a place of work later or non-complex telephone)

If you are unsure of your split between weekday and weekend PA counts from your historic monitoring period for this round of job planning, you will be able to enter your full PA On-Call value in under the section for weekday On-Call.

Add On-call

Add On-call

PA: 2.0000

Availability supplement: 5.00%

Level 1 (Attend a place of work immediately or undertake analogous interventions)

Level 2 (Attend a place of work later or non-complex telephone)

**Weekday work**

Weekday frequency \*

1 in 10

Weekday frequency including prospective cover:

8.07

Medium frequency

Predictable weekday PAs

2.0000

Unpredictable weekday PAs

**Weekend work**

Weekend frequency

1 in

Weekend frequency including prospective cover:

0.00

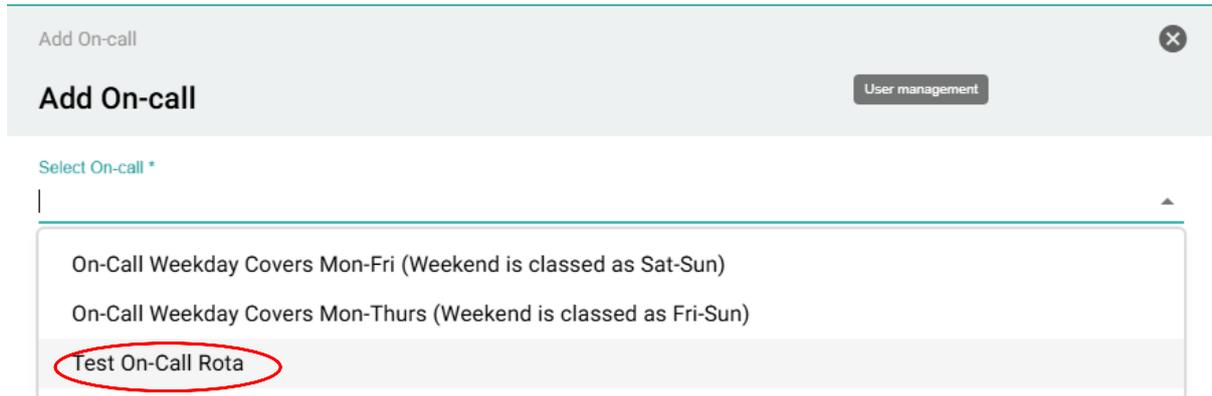
Predictable weekend PAs

Unpredictable weekend PAs

## Template On-Call

Within Allocate JobPlan there is also the ability to pre-populate information with regards to each departments specific on-call duties, this will allow the user to select their team on-call rota from a drop down menu, reducing manually input and subsequent errors.

This information would need to be provided by each department and would be uploaded by the Project Team. Once this has been uploaded, the relevant on-call rotas would appear from the drop down menu as seen below with the test example:



The screenshot shows a web interface for adding on-call duties. At the top, there is a header bar with the text "Add On-call" on the left and a close button (X) on the right. Below the header, the main title "Add On-call" is displayed on the left, and a "User management" button is on the right. The main content area features a label "Select On-call \*" followed by a dropdown menu. The dropdown menu is open, showing three options: "On-Call Weekday Covers Mon-Fri (Weekend is classed as Sat-Sun)", "On-Call Weekday Covers Mon-Thurs (Weekend is classed as Fri-Sun)", and "Test On-Call Rota". The "Test On-Call Rota" option is highlighted with a red circle.

Once you have selected the “Test On-Call Rota” you will see this information will automatically pre-populate. After reviewing this information, you can then select “save” and this will add to your job plan. The details within the pre-populated on-call option cannot be amended, so if these are incorrect then this must be highlighted to your first sign and the manual input of on-call can be used.



## Add On-call

User management

📄 PAs: 2.5000

📈 Availability supplement: 5.00%

Select On-call \*

Test On-Call Rota|



*(Weekend is classed as Friday to Sunday for this rota)*

On-call location \*

\*University Hospital Monklands

Level \*

- Level 1 (Attend a place of work immediately or undertake analogous interventions)
- Level 2 (Attend a place of work later or non-complex telephone)

### Weekday work

Weekday frequency \*

1 in 10

Weekday frequency including prospective cover:

**8.07**

**Medium frequency**

Predictable weekday PAs

1.5000

Unpredictable weekday PAs

0.0000

### Weekend work

Weekend frequency

1 in 12

Weekend frequency including prospective cover:

**9.69**

**Low frequency**

Predictable weekend PAs

1.0000

Unpredictable weekend PAs

0.0000

## 7.4 Activities – partial example

Below is a partially complete example

Start time	Finish time	Travel time	CRA	Category	Activity	Worked in weeks	Location	Num/Yr	PA	Hrs/Wk	Hrs/Yr
09:00	13:00	0:00	0:00	SPA	Core SPA	1	*Monklands Hospital	21.00	0.5000	2:00	84:00
09:00	12:00	0:00	0:00	ED	Care Quality Commission (CQC) work	2	*Monklands Hospital	21.00	0.3750	1:30	63:00
13:00	17:00	0:00	0:00	DCC	Theatre - ENT	1	*Monklands Hospital	21.00	0.5000	2:00	84:00
								<b>Core</b>	<b>1.3750</b>	<b>5:30</b>	<b>231:00</b>
								<b>ATC</b>		<b>0:00</b>	<b>0:00</b>

Start time	Finish time	Travel time	CRA	Category	Activity	Worked in weeks	Location	Num/Yr	PA	Hrs/Wk	Hrs/Yr
09:00	13:00	0:00	0:00	DCC	Admin - Patient Admin	1, 2	*Monklands Hospital	42.00	1.0000	4:00	168:00
								<b>Core</b>	<b>1.0000</b>	<b>4:00</b>	<b>168:00</b>

Using the tabs at the top, you can change the view to show only Timetabled, flexible or On-call activities

Selecting timetabled will show a week by week breakdown of all timetabled activities

Week	Day	Activity	Start Time	End Time
Week 1	Monday	Core SPA	09:00	13:00
	Monday	Theatre - ENT	13:00	17:00
Week 2	Tuesday	Admin - Patient Admin	09:00	13:00
	Wednesday	College Clinical Tutor	09:00	17:00

The flexible tab will show a list of flexible activities

Normal time	Premium time	Travel time	CRA	Category	Activity	Property	Location	Num/Yr	PA	Hrs/Wk	Hrs/Yr
4:00	0:00	0:00	0:00	DCC	Admin - Patient Admin	Core	*Monklands Hospital	20.98	0.4995	2:00	83:55
4:00	0:00	0:00	0:00	DCC	Theatre - Emergency	Core	*Monklands Hospital	10.00	(0.2381)	(0:57)	(40:00)

## 8. Summary & Requesting Sign-Off

Once all activities have been added, you are able to view the summary tab, from here you will be able to view a summary of all your activity types including PA values, Core hours, ATC hours and premium hours.

Dr Test Example ← Back to Manage job plans

1. General Information    2. Objectives    3. Activities    **4. Summary**    5. Finish

**Paid PA Value: /**

This overview allows you to check if the balance of activities is consistent with national and local guidelines.  
*NB: Rounding to 4 decimal places may mean that there are small differences between totals and the detailed breakdown.*

Category	Total PAs	Core Hrs	ATC Hrs	Total Hrs	Premium Hrs
> Direct Clinical Care	2.5683	9:56	0:00	9:56	0:59
- Supporting Professional Activities	0.0000	0:00	0:00	0:00	0:00
- Additional NHS Responsibilities	0.0000	0:00	0:00	0:00	0:00
- External Duties	0.0000	0:00	0:00	0:00	0:00
- Fee Paying Services	0.0000	0:00	0:00	0:00	0:00
- Private Professional Services	0.0000	0:00	0:00	0:00	0:00

From the summary screen, if you click save and continue this will take you to the Finish tab

**i** If you have finished working on your job plan, please click on Request sign off. 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. [Request sign off](#) [Leave in discussion](#)

Additional Comments  
If you have any ideas, suggestions or complaints that you would like to be noted, please include them here.

If you have more to add or changes to make, you should click “Leave in Discussion” and you are then able to continue at a later time going back through the previous tabs by clicking on them, you may also add additional comments that will be visible to your Sign-off reviewers.

*When you request sign-off the status of your job plan will change to awaiting 1<sup>st</sup> sign off, at this point you cannot make changes. You do have the option to cancel the request for sign-off which will allow you to make the changes required, however this is only possible while it's awaiting 1<sup>st</sup> sign-off. Once 1<sup>st</sup> sign-off has been approved and it moves to 2<sup>nd</sup> sign-off you are no longer able to edit or cancel. Your 2<sup>nd</sup> sign-off manager will need to move your job plan back to discussion to allow changes to be made, at which point the approval process would begin again.*

If you are happy with your job plan, on the Finish screen you should click on the option to “Request sign-off”, at which point your sign-off reviewer will be notified that your job plan is ready to be reviewed. (Each department may have differing number of levels of sign off, between 1-3 levels. This information has been pre-selected within the system from information provided by HR Medical & Dental Staffing)

\*Please be aware that there is a mutual responsibility for job plans to be fully signed off and you must review sign off status regularly and raise with your CD, CMS/AMD if not signed off in a timely manner. It is important that the sign off process is completed without delay as HR will review updates on a weekly basis for making any payroll changes within the eESS system.

***Please note if there are any increases to your number of sessions or availability supplement, approval must first be sought from management accounts to ensure that the department have budget for the changes.***

## 9. Activity language and definitions

Please see below a copy of the activity language and definitions which may help in finding what groups the activities you are adding fall under.

### **Consultant Contract (2007) – s4.2.3 Direct Clinical Care Duties (DCC)**

DCC duties include:

- Emergency duties (including emergency work carried out during or arising from on-call);
- Operating sessions;
- Pre and post-operative care;
- Ward rounds
- Outpatient clinics
- Clinical diagnostic work
- Other patient treatment
- Public health duties
- Multi-disciplinary meetings about direct patient care
- Administration directly related to patient care (e.g. referrals, notes, complaints, correspondence with other practitioners)
- On-site medical cover
- Any other work linked to the direct clinical care of NHS patients
- Travelling time associated with any of these duties

### **Consultant Contract (2007) – s4.2.4 Supporting professional activities (SPA)**

SPA duties include:

- Continuing professional development
- Teaching and training
- Management of doctors in training
- Audit
- Job planning
- Appraisal
- Revalidation

- Research
- Contribution to service management and planning
- Clinical governance activities
- Any other supporting professional activities
- Travelling time associated with these duties

#### **Consultant Contract (2007) – s4.2.5 Additional Responsibilities**

Additional responsibilities are duties of a professional nature carried out for or on behalf of the employer or the Scottish Government which are beyond the range of the supporting professional activities normally to be expected of a consultant. Additional responsibilities are:

- Caldicott guardians
- Clinical Audit leads
- Clinical Governance leads
- Undergraduate and Postgraduate deans
- Clinical Tutors
- Regional Education Advisers
- Formal medical management responsibilities
- Other additional responsibilities agreed between a consultant and his/her employer which cannot reasonably be absorbed within the time available for supporting professional activities
- Travelling time associated with these duties

#### **Consultant Contract (2007) – s4.2.7 Other External Duties**

4.2.7 Other external duties comprise work not directly for the NHS employer, but relevant to and in the interests of the NHS. Examples include:

- Trade Union and professional association duties
- Acting as an external member of an advisory appointments committee
- Undertaking assessments for NHS Education for Scotland, NHS Quality Improvement for Scotland or equivalent bodies
- Work for the Royal Colleges
- Work for the General Medical Council or other national bodies concerned with professional regulation
- NHS disciplinary procedures
- NHS appeals procedures
- Travelling time associated with these duties

#### **Consultant Contract (2007) – s4.3 FEE PAYING WORK**

Fee-paying work is that which is not part of contractual work and not reasonably incidental to it

#### **Consultant Contract (2007) – s4.4.1 EXTRA PROGRAMMED ACTIVITIES**

Extra programmed activities (EPAs) are those in excess of 10 per week for

full-time consultants, and in excess of the number of programmed activities in the main contract agreed for part-time consultants.

**Consultant Contract (2007) – s4.4.7 Private Practice**

‘Private practice’ is defined as:

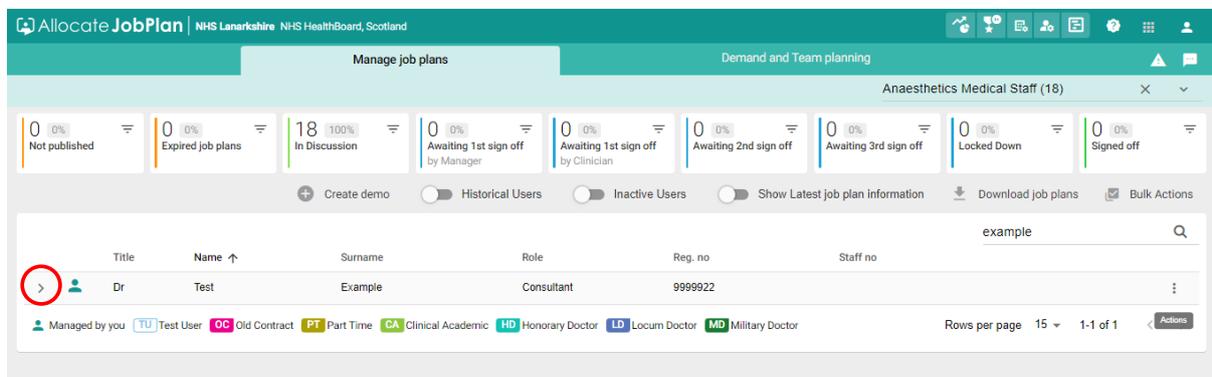
- a) the diagnosis or treatment of patients by private arrangement (including such diagnosis or treatment under Section 57 of the National Health Service (Scotland) Act 1978 as inserted by Section 7 (11) of the Health Medicines Act 1988 and further amended by Schedule 9 to the NHS and Community Care Act 1990), excluding, however, work of the kind referred to in **Section 4.3** and **Section 9** of these terms and conditions of service; and
- b) work in the general medical, dental or ophthalmic services under Part 2 of the National Health Service (Scotland) Act 1978.

A consultant (whether working full-time or part-time) who wishes to undertake private practice as defined above, must first inform his/her employer in writing. A consultant appointed after 1 April 2004 who already undertakes private must inform his/her employer of this in writing at the time of appointment.

## Manager/Sign off

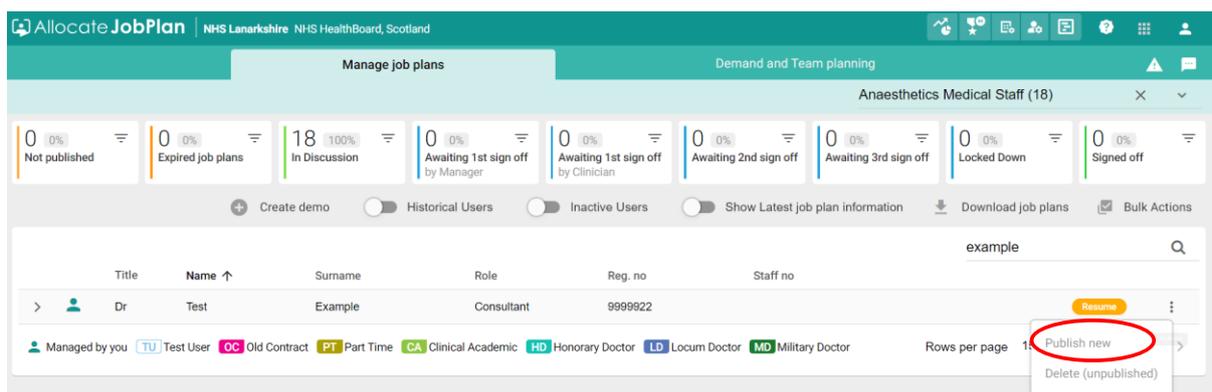
### 10. Publishing First Job plan

Once logged in to Allocate JobPlan, you should be able to see all user's that you are responsible for. By clicking the arrow highlighted you will be able to see the user's job plan.

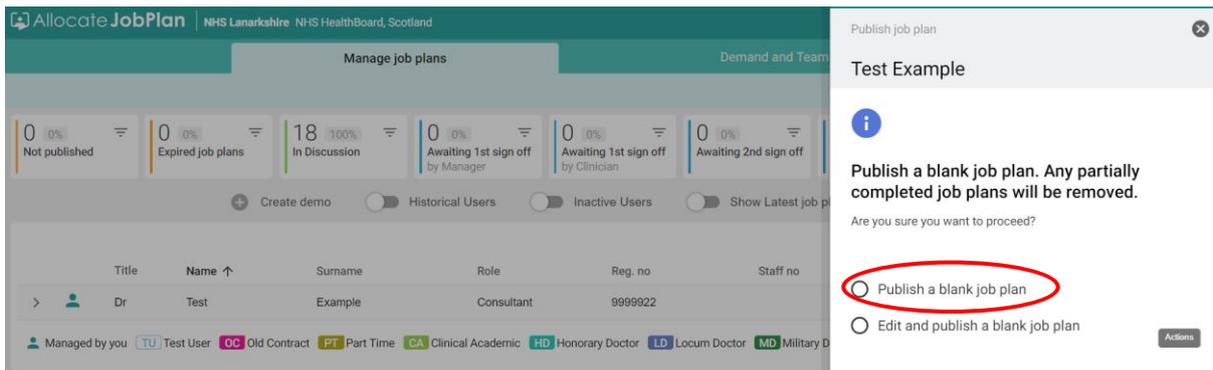


The screenshot shows the 'Manage job plans' section of the Allocate JobPlan interface. At the top, there are several status indicators: 'Not published' (0%), 'Expired job plans' (0%), 'In Discussion' (18/100%), 'Awaiting 1st sign off by Manager' (0%), 'Awaiting 1st sign off by Clinician' (0%), 'Awaiting 2nd sign off' (0%), 'Awaiting 3rd sign off' (0%), 'Locked Down' (0%), and 'Signed off' (0%). Below these are filters for 'Historical Users', 'Inactive Users', and 'Show Latest job plan information'. A search bar contains the text 'example'. The main table has columns for 'Title', 'Name', 'Surname', 'Role', 'Reg. no', and 'Staff no'. The first row shows 'Dr Test Example Consultant 999922'. A red circle highlights a right-pointing arrow next to the 'Name' column. Below the table are filters for 'Managed by you' (TU Test User, OC Old Contract, PT Part Time, CA Clinical Academic, HD Honorary Doctor, LD Locum Doctor, MD Military Doctor) and 'Rows per page' (15) and '1-1 of 1'.

*To publish a job plan for the annual cycle or interim job plans, click the 3 dots to the right and selecting "publish new" and then "publish a blank job plan"*

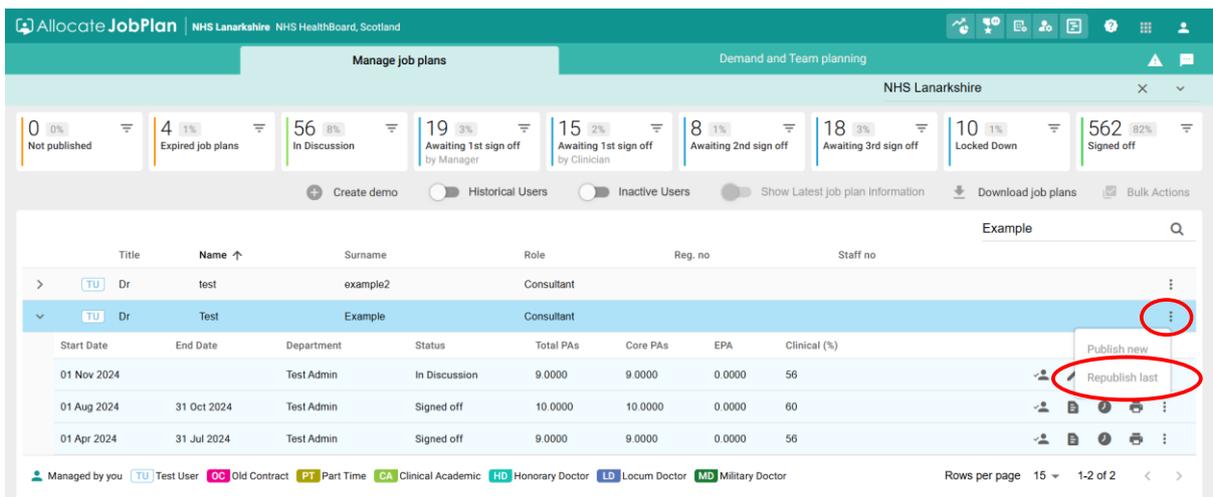


This screenshot is similar to the previous one, but it shows a dropdown menu for the user entry 'Dr Test Example Consultant 999922'. The menu options are 'Resume', 'Publish new', and 'Delete (unpublished)'. A red circle highlights the 'Publish new' option.

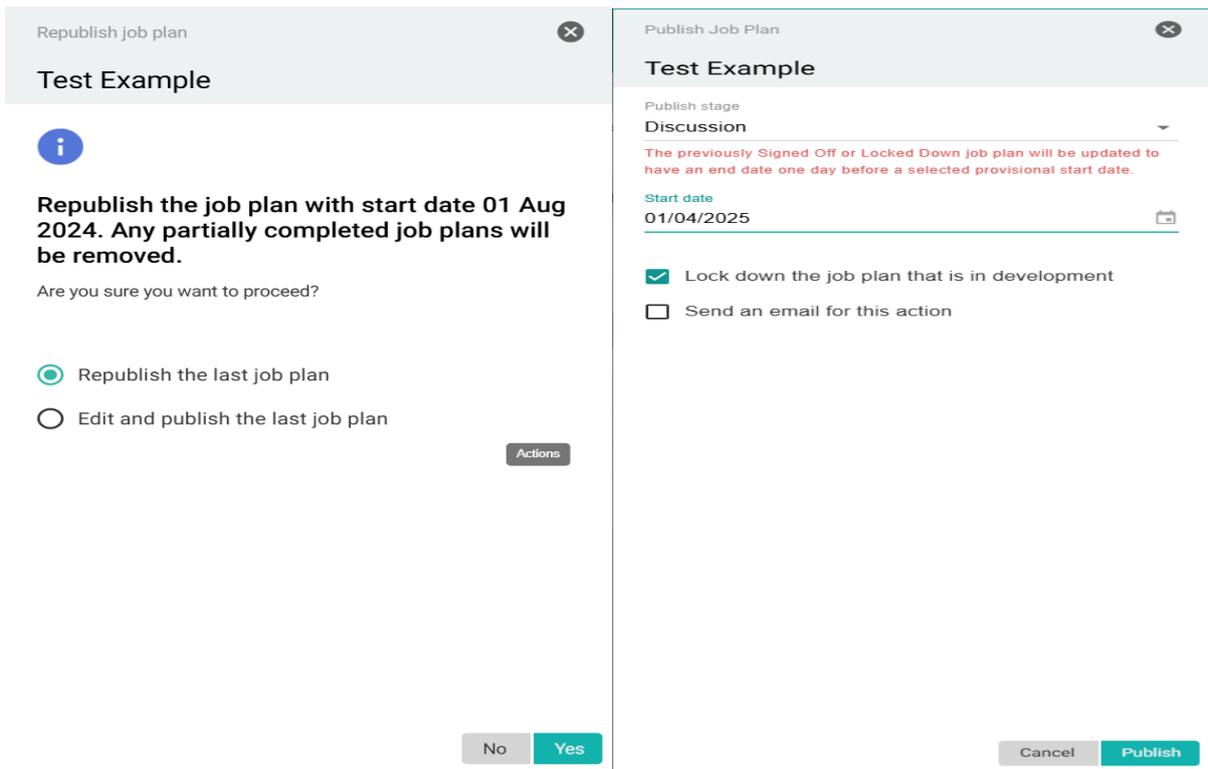


## 11. Re-publishing job plans (Annual & Interim)

If appropriate, you will be able to re-publish the user's previous job plan for them to edit and then submit. This is done by clicking the 3 dots as highlighted below and selecting "Republish last".



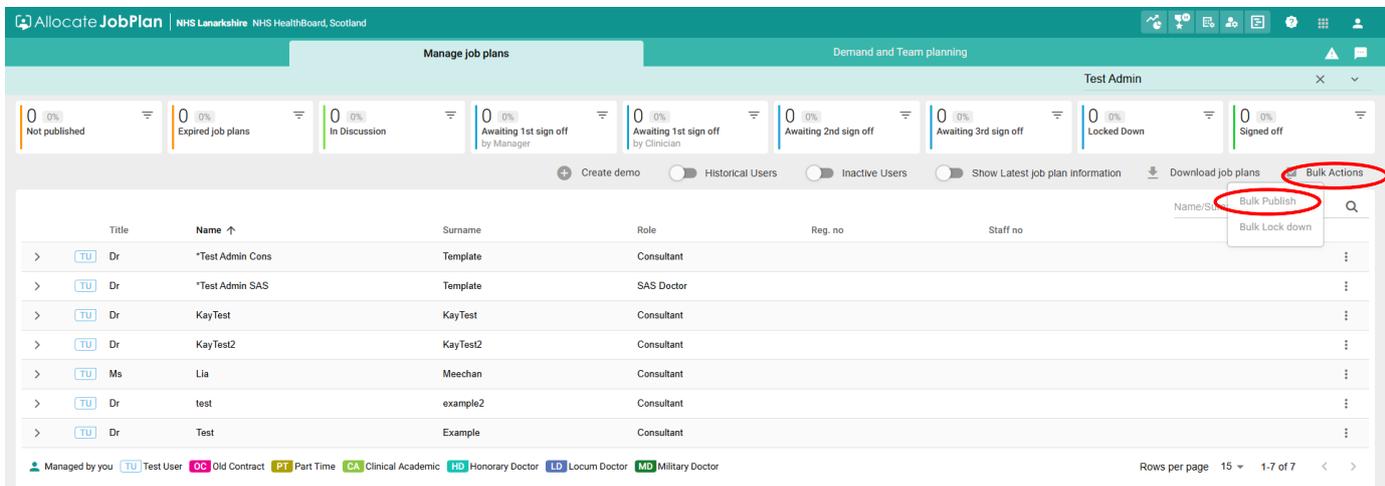
Once you have selected the job plan you which to republish, you will see the screen below on the left. Once you have selected "Republish the last job plan" you will be asked to confirm the start date for the new job plan (as shown below on the right) as well as if you would like to send an email alert to the user to advise a new job plan has been published. Once "Publish" has been selected the job plan will now sit "in discussion" and will be available to edit.



## 11.1 Publishing job plans in bulk (Annual & Interim)

Allocate JobPlan has the functionality to complete the task of publishing job plans in bulk. This function will be highly effective when it is time to publish job plans for the annual job plan cycle. The steps below will show how to complete this task:

Firstly, as seen below select “Bulk Actions” on the far right of the Allocate JobPlan page and select “Bulk Publish”



This will provide you the option to multi-select the individuals you wish to publish new job plans for. Once you have selected the correct users you can select “Publish blank job plans”, “Publish last signed off job plans” or “Edit and publish job plans for a worker group”. As shown below, the option to “Publish last signed off job plans” is recommended in most cases.

The screenshot shows the 'Allocate JobPlan' interface for 'NHS Lanarkshire NHS HealthBoard, Scotland'. The main area is titled 'Manage job plans' and displays a list of users with columns for Title, Name, Surname, Role, Reg. no, and Staff no. Two users are selected, indicated by checkmarks in the first column. At the bottom, a dark action bar contains three options: 'Publish blank job plans', 'Publish last signed off job plans' (which is circled in red), and 'Edit and publish job plans for a worker group'. The interface also shows various filters and statistics at the top, such as '0% Not published', '0% Expired job plans', etc.

As shown below, you will be asked to confirm (image on the left) if you are happy to proceed, you should select “Yes”. This will then take you to then second screen (image on the right). This screen will allow you to set the start date for the new job plan and request the system to send an automated email to the user advising that a new job plan has been created. Once this information has been confirmed then you should select “Publish” and these new job plans will be available to the user.

Publish Job Plan ✕

**Any partially completed job plans will be removed.**

Are you sure you want to proceed?

No **Yes**

Publish last signed off job plans ✕

Please untick any clinical users that you do not wish to send an email to notifying them of their new job plan. The previously signed off job plan will be updated to have an end date one day before a selected provisional start date.

**Edit multiple records**

User details		New job plan		
Clinical User	Existing job plan	Publish stage	Start date	Send email
test example2	Signed off	Discussion	01/04/2025	<input checked="" type="checkbox"/>
Test Example	Signed off	Discussion	01/04/2025	<input checked="" type="checkbox"/>

Lock down the job plan that is in development

Cancel **Publish**

## 12. Signing-off or Returning to User

Please note;

- Users should have completed their appraisal on SOAR prior to having their job plan signed off.
- If users work more than 48hrs, they will need to have a valid 48hr waiver form completed.
- Sign-off manager's are responsible for ensuring PA values recorded for user's on the system are accurate and rounded appropriately. See below

Title	Name ↑	Surname	Role	Reg. no	Staff no			
Dr	Test	Example	Consultant	9999922		Pending request		
Start Date	End Date	Department	Status	Total PAs	Core PAs	EPA	Clinical (%)	
01 Apr 2024		Test Admin	Awaiting 1st sign off agreement	11.0000	11.0000	0.0000	77	<a href="#">Sign off</a> <a href="#">Back to discussion</a>

Once the user has completed their job plan, they should request sign-off. You should be notified via email when this happens and on subsequent log-ins, you should see that the option to “Sign-off” or “Back to Discussion” is available.

The screenshot shows the 'Allocate JobPlan' interface for 'NHS Lanarkshire NHS HealthBoard, Scotland'. The main section is 'Manage job plans' for 'Anaesthetics Medical Staff (18)'. It features a dashboard with various status indicators (Not published, Expired job plans, In Discussion, Awaiting 1st sign off, Awaiting 2nd sign off, Awaiting 3rd sign off, Locked Down, Signed off) and a table of job plans. The table has columns for Title, Name, Surname, Role, Reg. no, Staff no, Start Date, End Date, Department, Status, Total PAs, Core PAs, EPA, and Clinical (%). The row for 'Dr Test Example' is highlighted, and the 'Sign off' and 'Back to discussion' buttons are circled in red.

You can view the Job Plan by clicking on the document icon

This screenshot is identical to the previous one, but the document icon in the bottom right corner of the table row is circled in red, indicating that clicking it will view the job plan.

If there are changes required, you can select the option to change the job plan “Back to discussion”. You should then provide a reason for returning the Job Plan and once confirmed the users will be able to make the changes required.

If ready to proceed, you should click “sign-off” and then confirm on the following screen at which point the next sign-off approver will be notified or if you are the final approver, the job plan will be approved.

*Please note, the 1<sup>st</sup> sign off is the ‘Reviewer’, 2<sup>nd</sup> sign off is the ‘Clinical Director’ and 3<sup>rd</sup> sign off is the CMS or AMD. If you are the Reviewer and also the Clinical Director, you will require to complete both sign off levels.*

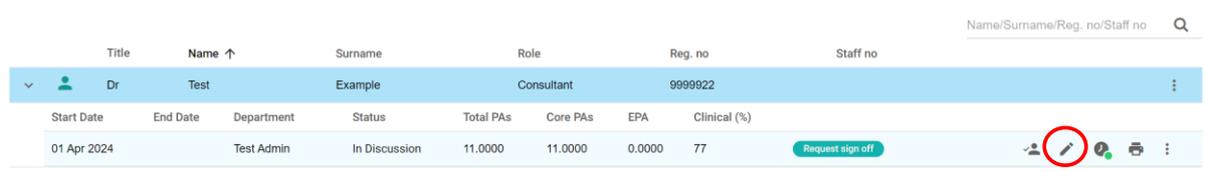
*If you are designated for multiple sign-off levels (1<sup>st</sup> and 2<sup>nd</sup> level or 2<sup>nd</sup> and 3<sup>rd</sup> level, you will have to select the sign off option multiple times.*

*Please refer to the scheme of delegation document to identify your sign off levels if unsure.*

## 13. Additional Features for Job Plans

### 13.1 Editing Job plan (Only available to 1<sup>st</sup> level sign-off reviewers)

1<sup>st</sup> Level sign-off reviewers are able to edit the job plans of the users they manage; this can only be performed while the job plan is still “In discussion”.



The screenshot shows a table with columns: Title, Name, Surname, Role, Reg. no, Staff no, Start Date, End Date, Department, Status, Total PAs, Core PAs, EPA, Clinical (%). A row is highlighted with a blue background. The 'Name' column contains 'Dr Test' and the 'Surname' column contains 'Example'. The 'Role' is 'Consultant' and 'Reg. no' is '9999922'. The 'Status' is 'In Discussion'. The 'Total PAs' is '11.0000', 'Core PAs' is '11.0000', 'EPA' is '0.0000', and 'Clinical (%)' is '77'. A 'Request sign off' button is visible. An edit icon (pencil) is circled in red.

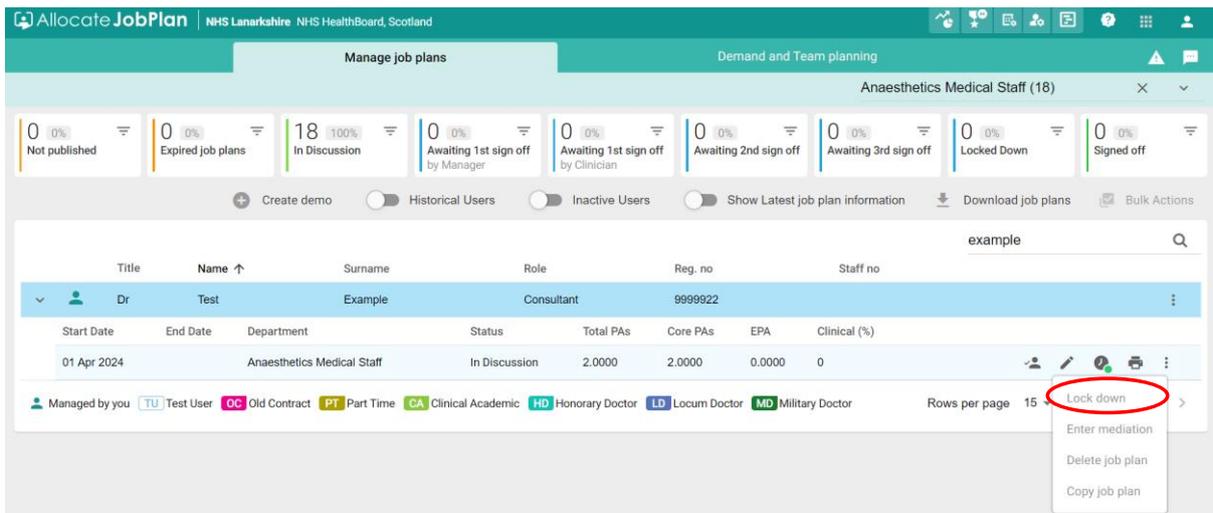
Title	Name	Surname	Role	Reg. no	Staff no	Start Date	End Date	Department	Status	Total PAs	Core PAs	EPA	Clinical (%)	
Dr	Test	Example	Consultant	9999922		01 Apr 2024		Test Admin	In Discussion	11.0000	11.0000	0.0000	77	<a href="#">Request sign off</a> 

If editing the job plan on behalf of the user, once it has been filled in you can push the job plan to the user for them to sign-off. If they confirm the sign-off the job plan will move straight to “awaiting 2<sup>nd</sup> level sign-off”

## 13.2 Locking Down a job plan

If a new job plan needs to be published you can freeze the state of an “in Discussion” by making the job plan “Locked Down”, this places it into a read-only status to prevent further changes being made. Examples of when this may be done include if a staff member:

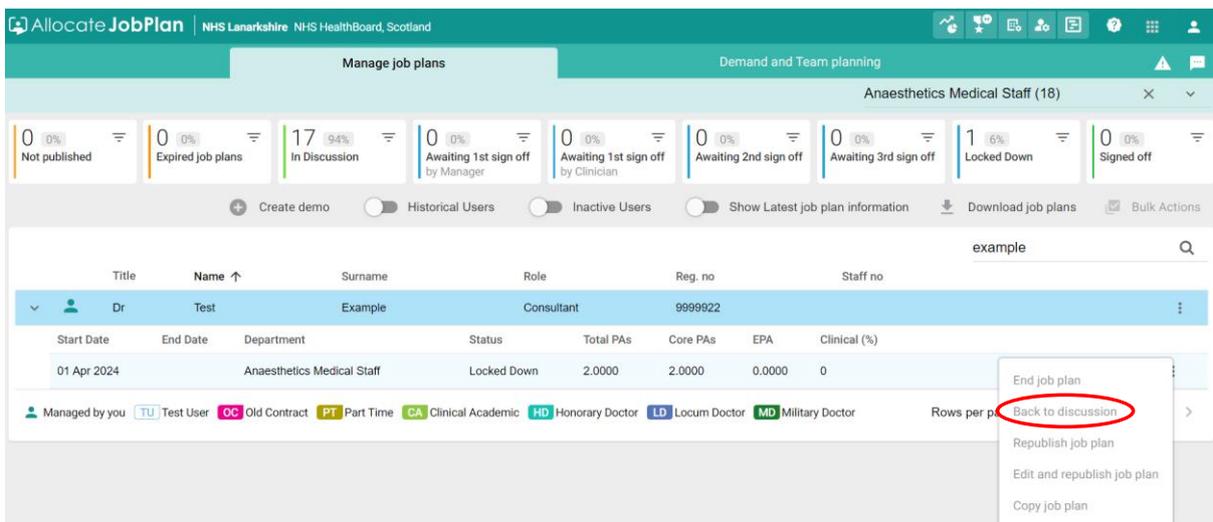
- is leaving their role,
- requires a new job plan due to a change of circumstances,
- is returning from long term illness for a phased return.



The screenshot shows the 'Allocate Job Plan' interface for 'Anaesthetics Medical Staff (18)'. The status bar indicates 18 job plans in 'In Discussion' (100%). A table lists job plan details for a staff member (Dr. Test Example, Consultant, Reg. no. 9999922). The job plan is currently in 'In Discussion' status. The actions menu for this job plan is open, and the 'Lock down' option is highlighted with a red circle.

Title	Name ↑	Surname	Role	Reg. no	Staff no		
Dr	Test	Example	Consultant	9999922			
Start Date	End Date	Department	Status	Total PAs	Core PAs	EPA	Clinical (%)
01 Apr 2024		Anaesthetics Medical Staff	In Discussion	2.0000	2.0000	0.0000	0

It can be taken out of this status by selecting “Back to discussion”



The screenshot shows the 'Allocate Job Plan' interface for 'Anaesthetics Medical Staff (18)'. The status bar indicates 17 job plans in 'In Discussion' (94%) and 1 job plan in 'Locked Down' (6%). The table shows the job plan for the same staff member is now in 'Locked Down' status. The actions menu is open, and the 'Back to discussion' option is highlighted with a red circle.

Title	Name ↑	Surname	Role	Reg. no	Staff no		
Dr	Test	Example	Consultant	9999922			
Start Date	End Date	Department	Status	Total PAs	Core PAs	EPA	Clinical (%)
01 Apr 2024		Anaesthetics Medical Staff	Locked Down	2.0000	2.0000	0.0000	0

### 13.3 Adding an end date

While a job plan is in the “locked down” or Signed-off status, it can be end dated. This could be done if a staff member:

- is leaving their role
- Is on Long term sickness (LTS), Maternity etc.
- Requires a new job plan to be created (e.g. interim job plan),
- requires their current/previous job plan to be ended for another reason

The screenshot shows the 'Allocate JobPlan' interface for 'NHS Lanarkshire NHS HealthBoard, Scotland'. The main heading is 'Manage job plans' and the sub-heading is 'Demand and Team planning'. The current view is for 'Anaesthetics Medical Staff (18)'. There are several status filters at the top: 'Not published' (0%), 'Expired job plans' (0%), 'In Discussion' (17, 94%), 'Awaiting 1st sign off by Manager' (0%), 'Awaiting 1st sign off by Clinician' (0%), 'Awaiting 2nd sign off' (0%), 'Awaiting 3rd sign off' (0%), 'Locked Down' (1, 6%), and 'Signed off' (0%). Below these are controls for 'Create demo', 'Historical Users', 'Inactive Users', 'Show Latest job plan information', 'Download job plans', and 'Bulk Actions'. A search bar contains 'example'. The table below has columns: Title, Name, Surname, Role, Reg. no, Staff no, Start Date, End Date, Department, Status, Total PAs, Core PAs, EPA, and Clinical (%). A row is highlighted with a blue background, showing 'Dr Test Example Consultant 9999922' with a status of 'Locked Down' and a start date of '01 Apr 2024'. A context menu is open over this row, with the 'End job plan' option circled in red. Other menu options include 'Back to discussion', 'Republish job plan', 'Edit and republish job plan', and 'Copy job plan'. At the bottom, there are filters for 'Managed by you' (TU Test User, OC Old Contract, PT Part Time, CA Clinical Academic, HD Honorary Doctor, LD Locum Doctor, MD Military Doctor) and a 'Rows per page' dropdown.

*The end date can be edited or removed on the same menu if required.  
An end dated job plan can be restarted (this will show as a new job plan with the same contents from the previous, but it won't require to go through sign off process again).*

## 13.4 Enter mediation

If required a job plan may be entered into a mediation phase.

*This is only possible while the job plan is in the "In Discussion" status, if a job plan has been requested for sign-off it has to be moved back to "In Discussion" first.*

*For advice on when this applies please see; Annual Job Plan Guidance For Consultants And SAS Doctors, section 6*

The screenshot shows the 'Allocate JobPlan' interface for NHS Lanarkshire. The main heading is 'Manage job plans' with a sub-heading 'Demand and Team planning'. The current view is for 'Anaesthetics Medical Staff (18)'. The interface displays a progress bar for various job plan statuses: Not published (0%), Expired job plans (0%), In Discussion (18/100%), Awaiting 1st sign off by Manager (0%), Awaiting 1st sign off by Clinician (0%), Awaiting 2nd sign off (0%), Awaiting 3rd sign off (0%), Locked Down (0%), and Signed off (0%). Below the progress bar are several toggle switches: 'Create demo', 'Historical Users', 'Inactive Users', 'Show Latest job plan information', 'Download job plans', and 'Bulk Actions'. A search bar contains the text 'example'. A table lists job plan details for a user named 'Dr Test Example' (Role: Consultant, Reg. no: 9999922). The table columns include Title, Name, Surname, Role, Reg. no, Staff no, Start Date, End Date, Department, Status, Total PAs, Core PAs, EPA, and Clinical (%). The current job plan is in 'In Discussion' status with 2,000 Total PAs and 2,000 Core PAs. At the bottom, there are filters for 'Managed by you' (TU Test User, OC Old Contract, PT Part Time, CA Clinical Academic, HD Honorary Doctor, LD Locum Doctor, MD Military Doctor) and a 'Rows per page' dropdown set to 15. A context menu is open over the job plan row, with the 'Enter mediation' option highlighted by a red circle.

Details can then be entered into the next screen

- Bringer of action
- Reasons (Dispute, Other, Pay threshold)
- Reason comment
- Meeting date
- Meeting comment
- Clinical user document upload
- Clinical manager document upload
- Trust decision document upload

\*(If you have put your job plan into mediation status, please also contact your manager and HRMDS to confirm your request)

In Discussion ✕

### Test Example

Current stage: In Discussion

**History**

No records to display.

**Mediation details**

Bringer of action  
 Clinical user  Clinical manager

Reason  
Dispute JP

Reason comments

Meeting date  
11/01/2024 More actions

Meeting comments

Clinical user's document Upload file

Clinical manager's document Upload file More actions

Trust decision Upload file

Cancel Save

## 13.5 Moving to Appeal

A job plan that is currently in mediation, can be “moved to appeal”

*For advice on when this applies please see; Annual Job Plan Guidance For Consultants And SAS Doctors, section 6*

The screenshot shows the 'Allocate JobPlan' interface for NHS Lanarkshire. The main heading is 'Manage job plans' and the sub-heading is 'Demand and Team planning'. The current view is for 'Anaesthetics Medical Staff (18)'. There are several status filters at the top: 'Not published' (0%), 'Expired job plans' (0%), 'In Discussion' (17, 94%), 'Awaiting 1st sign off by Manager' (0%), 'Awaiting 1st sign off by Clinician' (0%), 'Awaiting 2nd sign off' (0%), 'Awaiting 3rd sign off' (0%), 'Locked Down' (0%), and 'Signed off' (0%). Below these are toggle switches for 'Create demo', 'Historical Users', 'Inactive Users', and 'Show Latest job plan information', along with buttons for 'Download job plans' and 'Bulk Actions'. A search bar contains the text 'example'. The main table has columns for 'Title', 'Name', 'Surname', 'Role', 'Reg. no', and 'Staff no'. A row is highlighted with 'Dr Test Example Consultant 9999922'. Below this is a table with columns for 'Start Date', 'End Date', 'Department', 'Status', 'Total PAs', 'Core PAs', 'EPA', and 'Clinical (%)'. A row shows '01 Apr 2024', 'Anaesthetics Medical Staff', 'In Mediation', '2.0000', '2.0000', '0.0000', and '0'. At the bottom, there are filters for 'Managed by you' with various roles like 'TU Test User', 'OC Old Contract', 'PT Part Time', 'CA Clinical Academic', 'HD Honorary Doctor', 'LD Locum Doctor', and 'MD Military Doctor'. A 'Rows per page' dropdown is also visible. A context menu is open over the table row, with options: 'Lock down', 'View mediation details', 'Move to appeal' (circled in red), and 'Copy job plan'.

Details that can be entered;

- Bringer of action
- Comments
- Appeal date
- Chairman
- Clinical user rep
- Third party
- Clinical user's written case document upload
- Trust's written case document upload
- Panel recommendations document upload
- Trust decision

History	Appeal details
<p><b>Mediation</b> 11/01/2024 </p>	<p>Bringer of action <input checked="" type="radio"/> Clinical user <input type="radio"/> Trust</p> <p>Comments <hr/></p> <p>Appeal date 11/01/2024 </p> <p>Chairman <span style="float: right;">More actions</span> <hr/></p> <p>Clinical user rep <hr/></p>

Third party

---

- Clinical user's written case Upload file
  
- Trust's written case Upload file
  
- Panel Recommendations Upl More actions
  
- Trust decision Upload file

## 14. Interim Job Plan Process

If changes are required to your job plan through the year then an interim job plan requires to be completed. The interim job plan can be published by your 1<sup>st</sup> sign off.

Once the interim job plan has been published you will be notified via email (example shown below). The job plan published by default will be a copy of the previous job plan available for you to modify. If you prefer a blank job plan template, please advise at outset of the process.

### Subject

Allocate JobPlan: Published job plan

### Description

**This email has been automatically generated by Allocate JobPlan. Please do not reply to this email.**

Dear [FIRSTNAME] [SURNAME],

[MANAGER FIRSTNAME] [MANAGER SURNAME] has published a new job plan for you that has a start date of [START DATE].

You can review your job plan by logging in to Allocate JobPlan at the following link:

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

[www.allocatesoftware.co.uk](http://www.allocatesoftware.co.uk)

Examples of some reasons to complete an Interim Job Plan:

- Changes to overall PA value within job plan (either increase or decrease).
- Changes to DCC and SPA values within job plan
- Significant changes to activities completed within job plan.

If you are unsure that you require an interim job plan to be completed, then please reach out to your first sign off manager to confirm.

You should complete in the interim review in the same way as an annual job plan review with the same 3 levels of sign off (Section 1 – 7). An interim Job Plan review will generate a report to HR Medical and Dental Staffing to process pay changes. These will only be made on the completion and final sign off of the interim Job Plan.

## 14.1 Publishing an Interim Job Plan

An interim job plan can only be published by the 1<sup>st</sup> sign off or the Allocate JobPlan team, the 1<sup>st</sup> sign off user will also have the ability to edit the interim job plan.

When publishing an interim job plan, please ensure the correct “start date” is entered to reflect when the change to job plan is effective. Please see below the process of publishing an interim job plan.

*System actions shown below:*

The screenshot displays the 'Allocate JobPlan' interface for NHS Lanarkshire. At the top, there are navigation tabs for 'Manage job plans' and 'Demand and Team planning'. Below this, a dashboard shows various job plan status metrics: Not published (0), Expired job plans (2), In Discussion (166), Awaiting 1st sign off by Manager (51), Awaiting 1st sign off by Clinician (38), Awaiting 2nd sign off (31), Awaiting 3rd sign off (47), Locked Down (3), and Signed off (349). A search bar contains the text 'example'. Below the search bar is a table of job plans. The first row is highlighted in blue and contains the following data: Title 'Dr', Name 'Test', Surname 'Example', Role 'Consultant', Reg. no, and Staff no. A dropdown arrow is circled in red to the left of the user icon. Below the main table, there is a row of filters: 'Managed by you' (TU Test User), 'OC Old Contract', 'PT Part Time', 'CA Clinical Academic', 'HD Honorary Doctor', 'LD Locum Doctor', and 'MD Military Doctor'. A 'Request sign off' button is visible. At the bottom right, a context menu is open, showing options: 'Lock down', 'Enter mediation', 'Delete job plan', and 'Copy job plan'. The 'Lock down' option is circled in red.

Title	Name ↑	Surname	Role	Reg. no	Staff no
Dr	Test	Example	Consultant		

Start Date: 01 Apr 2024  
End Date: Test Admin  
Department: In Discussion  
Status: 10.0000  
Total PAs: 10.0000  
Core PAs: 0.0000  
EPA: 60  
Clinical (%): Request sign off

Managed by you: TU Test User OC Old Contract PT Part Time CA Clinical Academic HD Honorary Doctor LD Locum Doctor MD Military Doctor

Rows per page: 15

- Lock down
- Enter mediation
- Delete job plan
- Copy job plan

Begin by clicking the dropdown arrow to the left of the user, then the 3 dots to the right of the row with the job plan details. Then select “lockdown”.

Lock down ✕

### Test Example

**i**

**Lock down the job plan with start date 01 Apr 2024.**

Are you sure you want to proceed?

[More actions](#)

No Yes

Click yes to confirm

Allocate JobPlan | NHS Lanarkshire | NHS HealthBoard, Scotland

Manage job plans | Demand and Team planning

NHS Lanarkshire

0 0% Not published | 2 0% Expired job plans | 166 24% In Discussion | 51 7% Awaiting 1st sign off by Manager | 38 6% Awaiting 1st sign off by Clinician | 31 5% Awaiting 2nd sign off | 47 7% Awaiting 3rd sign off | 3 0% Locked Down | 349 51% Signed off

Create demo | Historical Users | Inactive Users | Show Latest job plan information | Download job plans | Bulk Actions

example

Title	Name ↑	Surname	Role	Reg. no	Staff no		
Dr	Test	Example	Consultant			⋮	
Start Date	End Date	Department	Status	Total PAs	Core PAs	EPA	Clinical (%)
01 Apr 2024	On-going	Test Admin	Locked Down	10.0000	10.0000	0.0000	60

Managed by you | TU Test User | OC Old Contract | PT Part Time | CA Clinical Academic | HD Honorary Doctor | LD Locum Doctor | MD Military Doctor | Rows per page 15 | 1-1 of 1

Now click the 3 dots again

Allocate JobPlan | NHS Lanarkshire | NHS HealthBoard, Scotland

Manage job plans | Demand and Team planning

NHS Lanarkshire

0 0% Not published | 2 0% Expired job plans | 166 24% In Discussion | 51 7% Awaiting 1st sign off by Manager | 38 6% Awaiting 1st sign off by Clinician | 31 5% Awaiting 2nd sign off | 47 7% Awaiting 3rd sign off | 3 0% Locked Down | 349 51% Signed off

Create demo | Historical Users | Inactive Users | Show Latest job plan information | Download job plans | Bulk Actions

example

Title	Name ↑	Surname	Role	Reg. no	Staff no		
Dr	Test	Example	Consultant			⋮	
Start Date	End Date	Department	Status	Total PAs	Core PAs	EPA	Clinical (%)
01 Apr 2024	On-going	Test Admin	Locked Down	10.0000	10.0000	0.0000	60

Managed by you | TU Test User | OC Old Contract | PT Part Time | CA Clinical Academic | HD Honorary Doctor | LD Locum Doctor | MD Military Doctor | Rows per page 15 | 1-1 of 1

- End job plan
- Back to discussion
- Republish job plan
- Edit and republish job plan
- Copy job plan

Then click "End job plan"

End Job Plan
✕

## Test Example

Please select an end date for this job plan

01/07/2024

Please write the reasons for ending the job plan

---

More actions

Cancel
Save

Confirm the end date and add any relevant reasons or comments

The screenshot shows the 'Allocate Job Plan' interface for NHS Lanarkshire. At the top, there are two tabs: 'Manage job plans' (active) and 'Demand and Team planning'. Below the tabs, there are several summary cards for different job plan statuses: Not published (0), Expired job plans (2), In Discussion (166), Awaiting 1st sign off by Manager (51), Awaiting 1st sign off by Clinician (38), Awaiting 2nd sign off (31), Awaiting 3rd sign off (47), Locked Down (3), and Signed off (349). Below these cards are several toggle switches for 'Create demo', 'Historical Users', 'Inactive Users', and 'Show Latest job plan information', along with 'Download job plans' and 'Bulk Actions' buttons. A search bar contains the text 'example'. Below the search bar is a table with columns: Title, Name, Surname, Role, Reg. no, Staff no, Start Date, End Date, Department, Status, Total PAs, Core PAs, EPA, and Clinical (%). The first row is highlighted in blue and shows 'Dr Test Example Consultant' with a status of 'Locked Down' and an end date of 'On-going until - 01 Jul 2024'. A red circle highlights the three-dot menu icon to the right of the user 'TU' in the first row. At the bottom, there is a legend for user roles and a 'More actions' button.

The job plan will now show as on-going until the entered end date. You can now click the 3 dots to the right of the user and select to “Publish new” or “Republish last”

Title	Name ↑	Surname	Role	Reg. no	Staff no		
TU	Dr	Test	Example	Consultant			
Start Date	End Date	Department	Status	Total PAs	Core PAs	EPA	Clinical (%)
01 Apr 2024	On-going until - 01 Jul 2024	Test Admin	Locked Down	10.0000	10.0000	0.0000	60

It is recommended that “Republish last” is used as this will allow the user to edit their most recent job plan, the start date will default to the day after the end date of the previous job plan.

The Job plan can now be completed or edited following the information from eJobPlan User Guide for completing Job Plan (Section 1 -8)

## 14.2 Reverting to a previous Job Plan

An interim job plan may only be required for a selected period of time and it may be necessary to revert back to a previous job plan. This can be achieved within the Allocate JobPlan system. but only by the 1<sup>st</sup> sign off user and the Allocate JobPlan Team. However, please ensure the interim job plan has been signed off before starting this process. However, please ensure the interim job plan has been signed off before starting this process.

System actions shown below:

Title	Name ↑	Surname	Role	Reg. no	Staff no		
TU	Dr	Test	Example	Consultant			
Start Date	End Date	Department	Status	Total PAs	Core PAs	EPA	Clinical (%)
01 Aug 2024	On-going	Test Admin	Signed off	10.0000	10.0000	0.0000	60
01 Apr 2024	31 Jul 2024	Test Admin	Signed off	9.0000	9.0000	0.0000	56

Begin by clicking the dropdown arrow to the left of the user, then the 3 dots to the right of the row with the job plan that is going to be reverted to and selecting “Republish job plan”.



## Test Example



Republish the job plan with start date 01 Apr 2024. Any partially completed job plans will be removed.

Are you sure you want to proceed?

More actions

No

Yes

The system will then look for confirmation of republishing the job plan that is required to be reverted to.

Republish Job Plan ✕

## Test Example

Publish stage  
**Discussion** ▼

The previously Signed Off or Locked Down job plan will be updated to have an end date one day before a selected provisional start date.

Start date  
 01/08/2025 📅

Lock down the job plan that is in development

Send an email for this action

**More actions**

Cancel Publish

Now select the new start date for the job plan, and make sure that you tick the “Lock down the job plan that is in development” box. If you select the “Send an email for this action” box, this will send an automated email to the doctor informing them that a new job plan has been published and they are required to action.

Allocate JobPlan | NHS Lanarkshire NHS HealthBoard, Scotland

Manage job plans Demand and Team planning

Test Admin ✕ ▼

0% 0% Not published

0% 0% Expired job plans

0% 0% In Discussion

0% 0% Awaiting 1st sign off by Manager

0% 0% Awaiting 1st sign off by Clinician

0% 0% Awaiting 2nd sign off

0% 0% Awaiting 3rd sign off

0% 0% Locked Down

0% 0% Signed off

+ Create demo 
 Historical Users
Inactive Users
Show Latest job plan information
Download job plans
Bulk Actions

Title	Name ↑	Surname	Role	Reg. no	Staff no			
▼	<span style="font-size: 0.8em;">TU</span> Dr	Test	Example	Consultant		⋮		
Start Date	End Date	Department	Status	Total PAs	Core PAs	EPA	Clinical (%)	
01 Nov 2024		Test Admin	In Discussion	9.0000	9.0000	0.0000	56	👤 ✎ ⌚ 🖨 ⋮
01 Aug 2024	On-going until - 31 Oct 2024	Test Admin	Signed off	10.0000	10.0000	0.0000	60	👤 📄 ⌚ 🖨 ⋮
01 Apr 2024	31 Jul 2024	Test Admin	Signed off	9.0000	9.0000	0.0000	56	👤 📄 ⌚ 🖨 ⋮

The current job plan will now show as “On-going” until the selected date and a new job plan will show as “In Discussion” from the confirmed start date.

## 15. New Starter Job Plan Process

A new doctor cannot be added to the Allocate JobPlan system until they have been successfully added to eESS (HR System) and provided with a Lanarkshire or NHS email account.

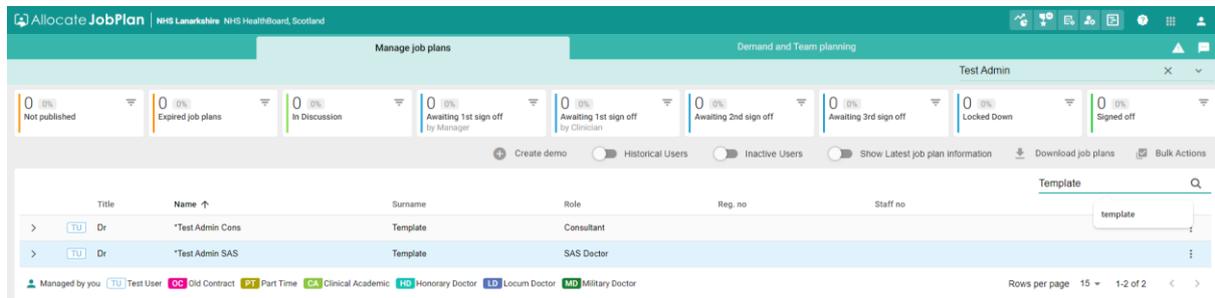
The Allocate JobPlan Team will then add them to the system, and provide login details for the doctor and publish their first job plan. These details will come from the email [noreply@allocatehealthsuite.com](mailto:noreply@allocatehealthsuite.com).

### 15.1 Template Job Plans

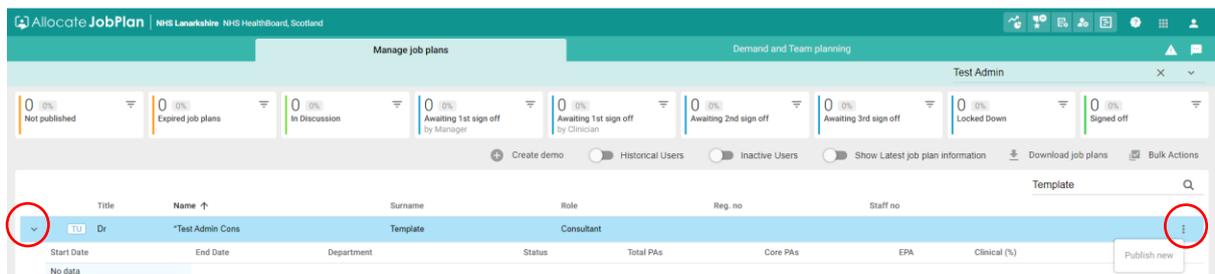
Two template job plans have been created for each department (currently only for UHH, UHM & UHW), one Consultant contract and one Speciality Doctor contract.

These templates are available to access by the 1<sup>st</sup> sign off for each department and have been created to allow job plan to be customised for new employees prior to them starting employment. The customised job plan can then be assigned to a doctor once they have been added to the Allocate Job Plan system.

Please see below the examples of the templates as well as the process for creating a template Job Plan and assigning to a new member of staff.



Each department will have a Consultant Template and a Speciality Doctor Template as show above.



Begin by clicking the dropdown arrow to the left of the user, then the 3 dots to the right of the row and select "Publish new".

Publish job plan ✕

**\*Test Admin Cons Template**

**Publish a blank job plan. Any partially completed job plans will be removed.**

Are you sure you want to proceed?

Publish a blank job plan

Edit and publish a blank job plan

Publish Job Plan ✕

**\*Test Admin Cons Template**

Publish stage  
Discussion ▼

The previously Signed Off or Locked Down job plan will be updated to have an end date one day before a selected provisional start date.

Start date  
11/09/2024 📅

Lock down the job plan that is in development

Send an email for this action

No

Yes

Cancel

Publish

Select “Publish a blank job plan” and then select the start date required, this should be the start date of the new doctor.

Title	Name ↑	Surname	Role	Reg. no	Staff no		
▼	TU	Dr	*Test Admin Cons	Template	Consultant		
Start Date	End Date	Department	Status	Total PAs	Core PAs	EPA	Clinical (%)
11 Sep 2024		Test Admin	In Discussion	0.0000	0.0000	0.0000	0
>	TU	Dr	*Test Admin SAS	Template	SAS Doctor		

Managed by you TU Test User OC Old Contract PT Part Time CA Clinical Academic HD Honorary Doctor LD Locum Doctor MD Military Doctor

Rows per page 15

Once this job plan has been published, it can be filled in the same way a normal job plan/interim job plan but would not require any form of sign off at this stage. Once the job plan is at a stage of completion, this template can then be copied to an existing doctor or new doctor once they are added to the system. This is completed by selecting the “copy job plan” option which is highlighted above.

Copy Job Plan ✕

**\*Test Admin Cons Template**

i

**Copy the job plan with start date 11 Sep 2024. Any partially completed job plans will be removed.**

Are you sure you want to proceed?

More actions

Copy Job Plan ✕

**\*Test Admin Cons Template**

Test Admin ✕ ▾

Select users

- KayTest KayTest In Discussion
- KayTest2 KayTest2 In Discussion
- test example2 In Discussion
- Test Example In Discussion

No
Yes
Cancel
Edit and Publish
Publish

Once confirmed that a job plan is being copied, it will then provide a list of all doctors in each department and will allow this job plan to be transferred to them.

Once the job plan has been transferred, the doctor can go ahead and make further changes and/or approve this by pushing for sign off if they are happy with the template job plan.