



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 user account login details for the system via email, this will be sent from noreply@allocatehealthsuite.com (please check your junk folders also). 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 or HR.

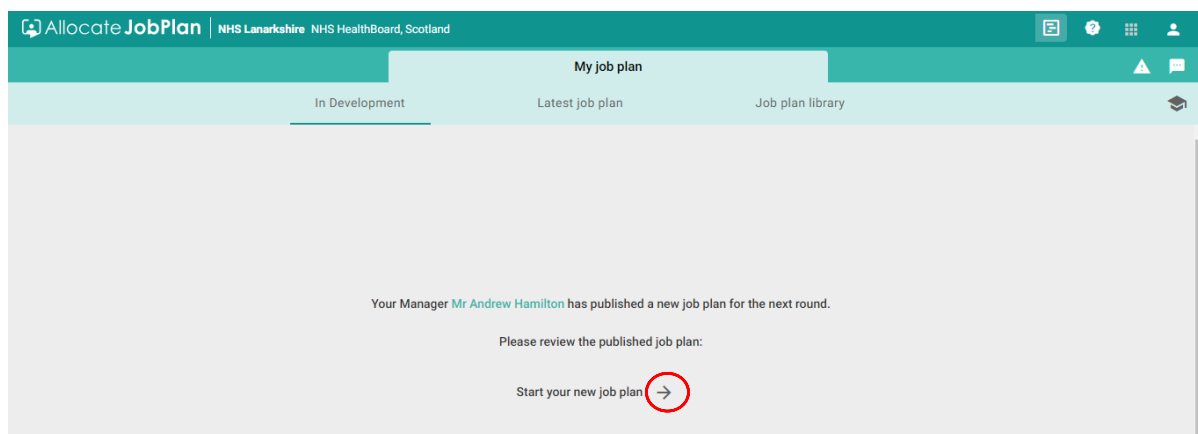
When you log in, you will be able to view your current and any past job plans that have been created on Allocate JobPlan within NHSL.

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 top navigation bar includes the logo and 'NHS Lanarkshire NHS HealthBoard, Scotland'. The main header shows 'My job plan' with tabs for 'In Development', 'Latest job plan', and 'Job plan library'. The 'In Development' tab is active.

Job plan status

- In Discussion** (indicated by a document icon)
- Start Date: 01 Apr 2024
- End Date: -
- Last Change: 03 Jan 2024 >

Basic Information

- Cycle: /
- Weeks in Attendance: 42 Weeks 0 Days

Summary

Total PAs Breakdo... Hours Breakdown

0.0000

Core 0.0000 100%

0

DCC	0.0000	Direct Clinical Care	ED	0.0000	External Duties
SPA	0.0000	Supporting Professional Activities	FPS	0.0000	Fee Paying Services
ANR	0.0000	Additional NHS Responsibilities	PPS	0.0000	Private Professional Services

The 'Edit Job Plan' button in the 'Job plan status' section is circled in red.

2. JobPlan - General Information Screen

Within the General Information screen

Please ensure the start date for your annual job plan is set as 1st April, interim job plan start dates may of course differ and should be set as an effective from date. 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 (if applicable), extracted from the old system, should be viewable as a PDF on this screen in the area highlighted.

You can also upload any additional evidence to this page to support your job plan Form 4, evidence for meeting time and service commitments such as SPA activity.

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 'Dr Test Example'. The screen is divided into sections: 1. General Information, 2. Objectives, 3. Resources, 4. Activities, 5. Summary, and 6. Finish. The 'General Information' section is active and contains the following fields:

- Start date:** 01/04/2024. Description: This is the date that the clinician starts working on their job plan. The start date will have been determined by the Clinical Manager.
- One premium hour PA equates *:** Radio buttons for 'Three hours' (selected) and 'Four hours'. Description: Sign off managers will be able to determine whether one PA of premium time equals either three or four hours of work.
- Paid PA Value:** Text field. Description: The Paid PA field enables the sign off manager to capture the agreed PAs that will be paid to a doctor as a result of any rounding policies that are applied following the job planning process.
- Role:** Consultant, Department: Test Admin.
- Employment type *:** Radio buttons for 'Full time' and 'Part time'. Description: Enter whether you work full time or part time in this organisation.
- Usual place of work *:** Dropdown menu. Description: Choose the location that you spend most of your time working at.
- Private practice *:** Radio buttons for 'Yes' and 'No'. Description: In accordance with your Terms & Conditions of Service, you are required to inform your employer if you intend to undertake private practice.
- Additional titles:** Checkboxes for 'Clinical Academic', 'Honorary Doctor', 'Locum Doctor', and 'Military Doctor'. Description: Select an additional title if appropriate. If you select Clinical Academic or Honorary Doctor, enter your university name in the field below.
- Other:** A red circle highlights this section, which contains the text 'No uploaded files.' and an 'Upload files' button. Description: Attach any relevant external documents that support your job plan in any common file format. Attached documents will be visible to your Sign-Off manager(s) and will be listed on the printable job plan. Documents do not automatically copy from one job plan to the next. You should not upload documents that contain any patient sensitive information or identifiers.

3. JobPlan - Objectives Screen

Within the Objectives screen

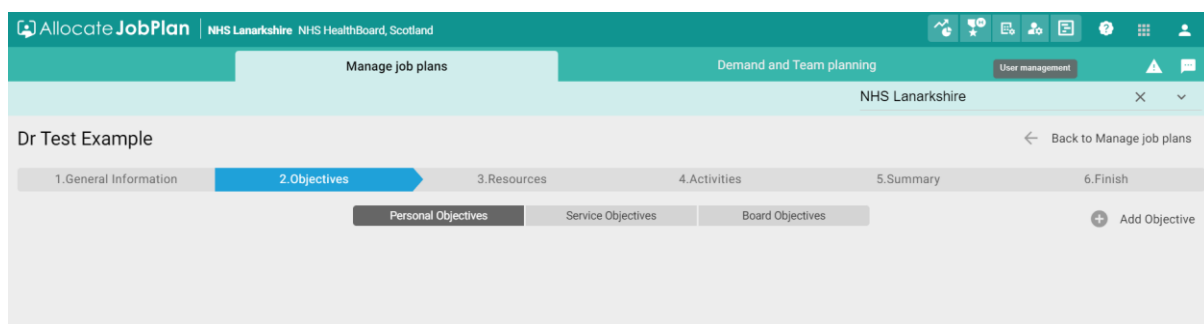
You should add/edit your personal objectives to your job plan and can also view the Board Objectives. Click “Save and Continue” on the bottom right of the screen.

The Board objectives have been added and are viewable under the corresponding tab. Service objectives can be added by the eJobPlan Project Team or HR if provided. Please submit the request for these to be added via HR Service Now. 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 wish to 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' and 'Demand and Team planning'. The 'User management' button is visible. The breadcrumb trail shows 'NHS Lanarkshire'. The main content area is titled 'Dr Test Example' and includes a 'Back to Manage job plans' link. The process flow consists of six steps: 1.General Information, 2.Objectives, 3.Resources (current step), 4.Activities, 5.Summary, and 6.Finish. The '3.Resources' step contains three sections: 'Staff', 'Equipment', and 'Clinical Space', each with a text input field.

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.

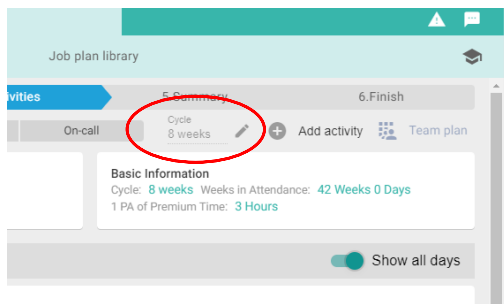
If you have a pattern that repeats every 4 weeks you would select a 4-week cycle

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 1st April will become week 1 of your cycle, your job plan start week should be set to week 1 too. Click Save

The 'Add Work Cycle' dialog box contains an information icon and the following 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.' Below this text 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 are 'Cancel' and 'Save' buttons.

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



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 Acute Medical Application Review Panel/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.

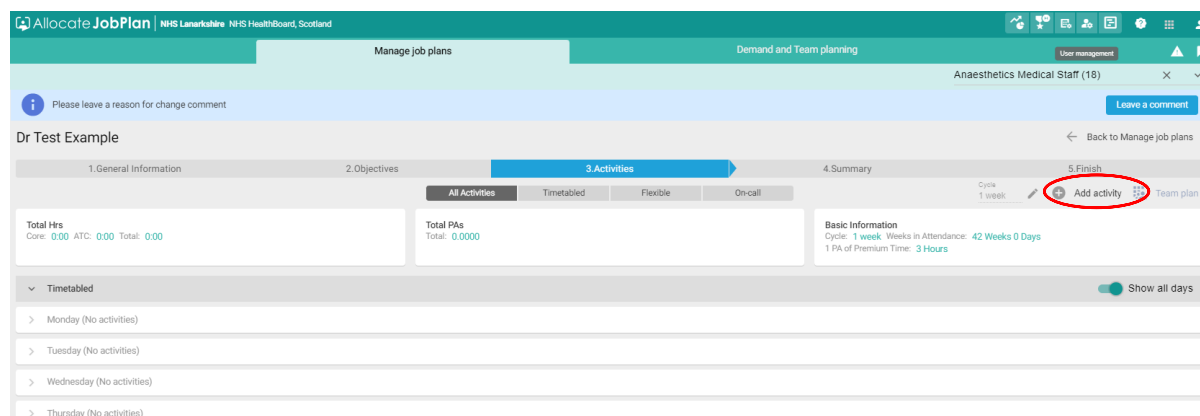
7. Adding Activities

Within the Activities screen

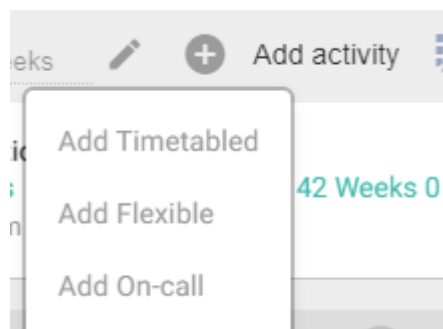
To add an activity, click “Add activity” highlighted below

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



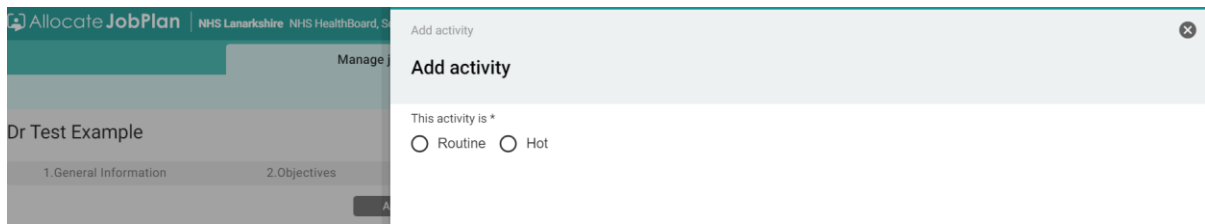
For reference:

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 HR via HR Service Now and to advise which activities are permitted as hot.

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

Using the tabs at the top, 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 HR via HR Service Now.

Non-DCC example

The screenshot shows the 'Add activity' form. The 'Activity details' section has a dropdown menu for 'Select a category *' with 'Supporting Professional Activities' selected. To the right, a larger dropdown menu for 'Select an activity *' is open, showing a list of activities including 'Appraisal (Own)', 'Appraising Others', 'Audit', 'Clinical Management - Team Meetings', 'Continuous professional development', 'Core SPA', 'Departmental Meeting', 'Directorate Meeting', 'Job Planning - Others', 'Job Planning - Own', and 'Local Clinical Governance Lead'.

DCC example

The screenshot shows the 'Add activity' form for a Direct Clinical Care (DCC) example. The 'Activity details' section has a dropdown menu for 'Select a category *' with 'Direct Clinical Care' selected. To the right, a larger dropdown menu for 'Select an activity *' is open, showing a list of activities including 'Admin - Patient Admin', 'Admin - Rota Clinical Input', 'MDT - Intensive Care Medicine', 'OPD - Pain Clinic', 'OPD - Preassessment Clinic', 'Theatre - Cardiology', and 'Theatre - Community Dental'. At the bottom of the form, there is a checkbox labeled 'Remember these settings when selecting the 'Add & New' option' which is currently unchecked. Below the checkbox are three buttons: 'Cancel', 'Add & New', and '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 *	Select an activity *
Direct Clinical Care	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 a 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	UNA Core	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 **PAs**

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

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

 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 1st 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 1st sign-off. Once 1st sign-off has been approved and it moves to 2nd sign-off you are no longer able to edit or cancel.
Your 2nd 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. Sign-off Reminders

To hopefully help in ensuring that job plans are signed off timeously we have switched on a reminders function within Allocate that will automatically send out email reminders to individuals and their managers at certain milestones after a job plan has been published. These will be as follows;

- 1 week after JP published - User is notified
- 2 Weeks after " - 1st sign-off manager is notified
- 3 weeks after " - 2nd sign-off manager notified
- 4 weeks after " - 3rd sign-off manager notified

Due to the way this has been designed even if the individual hasn't agreed their job plan or the previous managers haven't signed off yet, the subsequent managers will still get the reminders at the above milestones even if they cannot action their sign-off yet.

Although managers will not be able to sign-off their level until the previous levels have been signed off, these notifications will still make them aware that a job plan has been published for an individual but has still gone through sign-off, which could impact on changes to pay being delayed.

10. 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 reviewer

11. Publishing First(or blank) 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.

Allocate JobPlan | NHS Lanarkshire NHS HealthBoard, Scotland

Manage job plans Demand and Team planning

Anaesthetics Medical Staff (18)

0 0% Not published 0 0% Expired job plans 18 100% 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

example

Title	Name	Surname	Role	Reg. no	Staff no
Dr	Test	Example	Consultant	9999922	

Managed by you Test User Old Contract Part Time Clinical Academic Honorary Doctor Locum Doctor Military Doctor

Rows per page 15 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”

Allocate JobPlan | NHS Lanarkshire | NHS HealthBoard, Scotland

Manage job plans | Demand and Team planning

Anaesthetics Medical Staff (18)

0 0% Not published | 0 0% Expired job plans | 18 100% 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

example

Title	Name ↑	Surname	Role	Reg. no	Staff no
>	Dr	Test	Example	Consultant	9999922

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 1

Resume | Publish new | Delete (unpublished)

Allocate JobPlan | NHS Lanarkshire | NHS HealthBoard, Scotland

Manage job plans | Demand and Team planning

Test Example

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

Actions

12. 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".

Allocate JobPlan | NHS Lanarkshire | NHS HealthBoard, Scotland

Manage job plans | Demand and Team planning

NHS Lanarkshire

0 0% Not published | 4 1% Expired job plans | 56 8% In Discussion | 19 3% Awaiting 1st sign off by Manager | 15 2% Awaiting 1st sign off by Clinician | 8 1% Awaiting 2nd sign off | 18 3% Awaiting 3rd sign off | 10 1% Locked Down | 562 82% 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
>	TU	Dr	test	example2	Consultant
▼	TU	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	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

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 | 1-2 of 2

Publish new | 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.

Republish job plan

Test Example

i

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

Are you sure you want to proceed?

☒ Republish the last job plan

☐ Edit and publish the last job plan

Actions

No

Yes

Publish 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

01/04/2025

☒ Lock down the job plan that is in development

☐ Send an email for this action

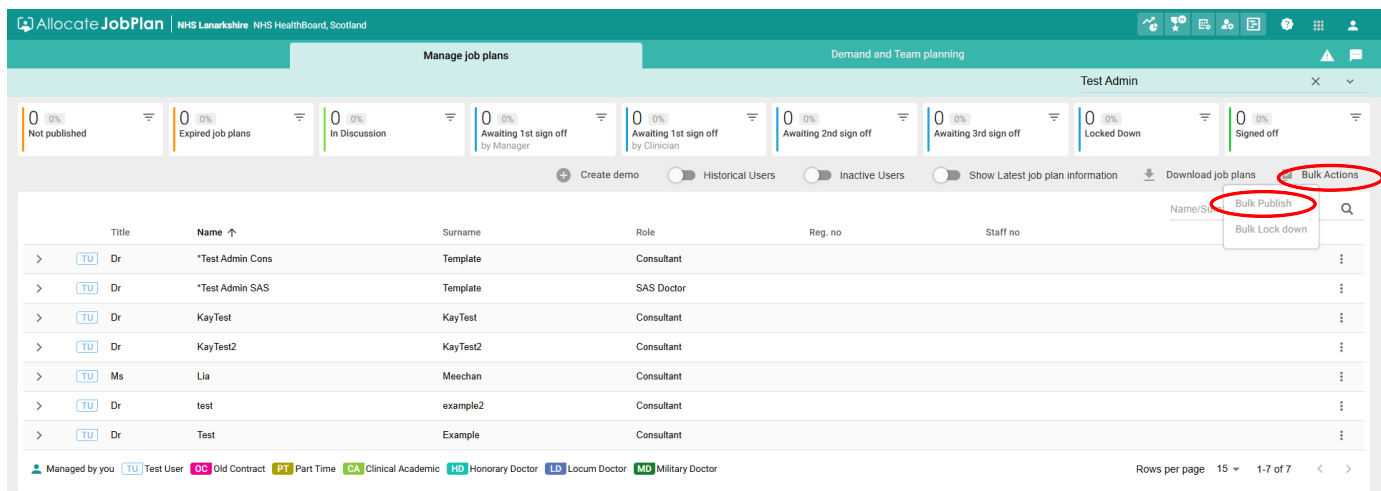
Cancel

Publish

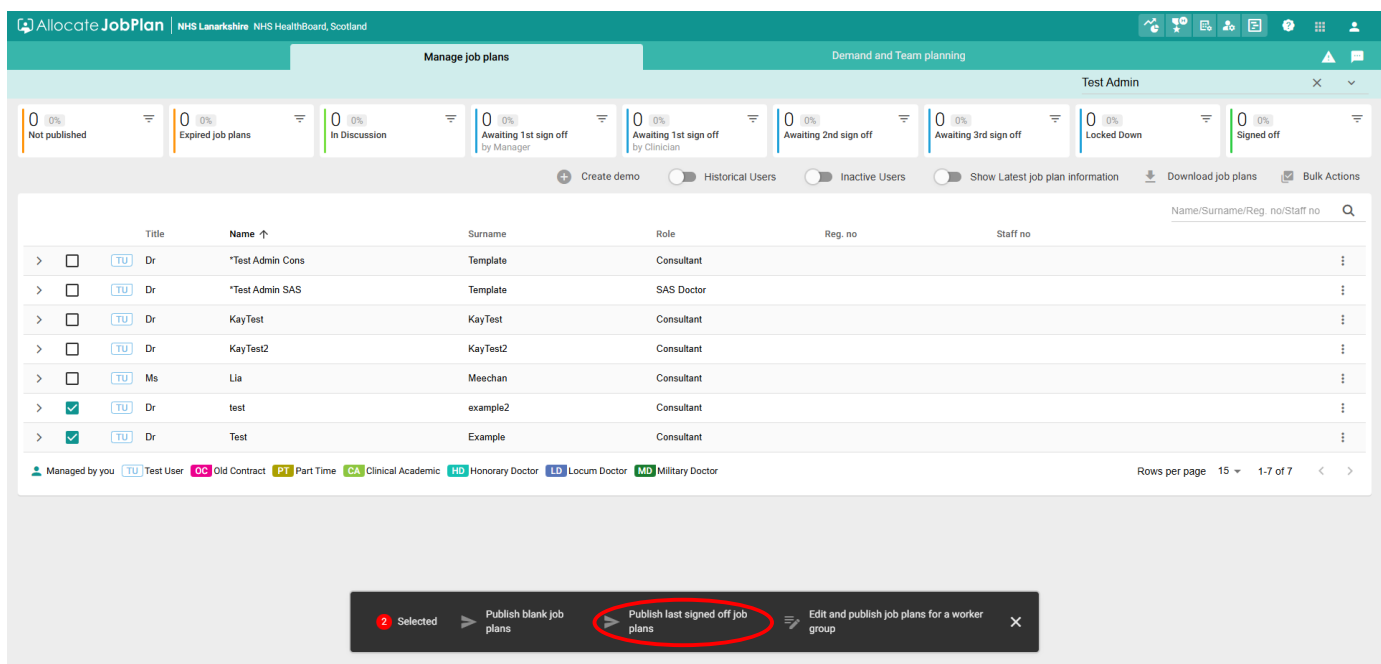
11.1 Publishing job plans in bulk (Annual & Interim)

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.



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.

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13. 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
				Sign off Back to discussion			

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.

Allocate JobPlan | NHS Lanarkshire | NHS HealthBoard, Scotland

Manage job plans | Demand and Team planning

Anaesthetics Medical Staff (18)

0 0% Not published | 0 0% Expired job plans | 17 94% In Discussion | 1 6% 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

example

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		Anaesthetics Medical Staff	Awaiting 1st sign off agreement	6.4428	6.4428	0.0000	55	Sign off Back to discussion

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

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

Allocate JobPlan | NHS Lanarkshire | NHS HealthBoard, Scotland

Manage job plans | Demand and Team planning

Anaesthetics Medical Staff (18)

0 0% Not published | 0 0% Expired job plans | 17 94% In Discussion | 1 6% 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

example

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		Anaesthetics Medical Staff	Awaiting 1st sign off agreement	6.4428	6.4428	0.0000	55	Sign off Back to discussion

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

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 1st sign off is the ‘Reviewer’, 2nd sign off is the ‘Clinical Director’ and 3rd 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 (1st and 2nd level or 2nd and 3rd 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.

14. Additional Features for Job Plans

14.1 Editing Job plan (Only available to 1st level sign-off reviewers)

1st 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”.

Name/Surname/Reg. no/Staff no									
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		Test Admin	In Discussion	11.0000	11.0000	0.0000	77	Request sign off	    

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 2nd level sign-off”

14.2 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 JobPlan' interface for 'NHS Lanarkshire NHS HealthBoard, Scotland'. The 'Manage job plans' tab is active, displaying a summary of 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 summary, there are filters for 'Create demo', 'Historical Users', 'Inactive Users', 'Show Latest job plan information', 'Download job plans', and 'Bulk Actions'. A table lists job plans 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 shows a job plan for 'Dr Test Example' (Consultant, Reg. no 9999922) with status 'In Discussion'. A dropdown menu is open for this row, showing options: 'Lock down' (highlighted with a red circle), 'Enter mediation', 'Delete job plan', and 'Copy job plan'.

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

The screenshot shows the 'Allocate JobPlan' interface for 'NHS Lanarkshire NHS HealthBoard, Scotland'. The 'Manage job plans' tab is active, displaying a summary of job plan statuses: 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 the summary, there are filters for 'Create demo', 'Historical Users', 'Inactive Users', 'Show Latest job plan information', 'Download job plans', and 'Bulk Actions'. A table lists job plans 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 shows a job plan for 'Dr Test Example' (Consultant, Reg. no 9999922) with status 'Locked Down'. A dropdown menu is open for this row, showing options: 'End job plan', 'Back to discussion' (highlighted with a red circle), 'Republish job plan', 'Edit and republish job plan', and 'Copy job plan'.

14.3 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

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.

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. The top navigation bar includes 'Manage job plans' and 'Demand and Team planning'. Below the navigation bar, there are status filters for various job plan stages: 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 the filters, there are toggle switches for 'Create demo', 'Historical Users', 'Inactive Users', 'Show Latest job plan information', 'Download job plans', and 'Bulk Actions'. A search bar with the text 'example' is present. The main table displays job plan details with 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 for 'Dr Test Example Consultant' with a status of 'Locked Down'. A context menu is open for this row, showing options: 'End job plan' (highlighted with a red circle), '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' and 'Rows per page'.

*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).*

14.4 Enter mediation

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

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

Allocate JobPlan | NHS Lanarkshire | NHS HealthBoard, Scotland

Manage job plans | Demand and Team planning

Anaesthetics Medical Staff (18)

0 0% Not published | 0 0% Expired job plans | 18 100% 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

example

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

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

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

14.5 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 'Manage job plans' tab is active, showing a table of job plans. The table has columns for Title, Name, Surname, Role, Reg. no, and Staff no. A dropdown menu is open for the 'In Mediation' status, with 'Move to appeal' highlighted. The table also shows a row for '01 Apr 2024' with 'Anaesthetics Medical Staff' and 'In Mediation' status. The 'Move to appeal' option is circled in red.

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

In Mediation

Test Example

Current stage: In Mediation

History

Mediation
11/01/2024

Appeal details

Bringer of action
☒ Clinical user ☐ Trust

Comments

Appeal date
11/01/2024

Chairman

Clinical user rep

More actions

Third party

Clinical user's written case

Upload file

Trust's written case

Upload file

Panel Recommendations

Upload file More actions

Trust decision

Upload file

15. 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 1st 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

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.

15.1 Publishing an Interim Job Plan

An interim job plan can only be published by the 1st sign off or the Allocate JobPlan team, the 1st 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. The top navigation bar includes 'Manage job plans' and 'Demand and Team planning'. Below this, a summary row shows various 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). A toolbar contains options like 'Create demo', 'Historical Users', 'Inactive Users', 'Show Latest job plan information', 'Download job plans', and 'Bulk Actions'. A search bar with the text 'example' is present. The main table lists job plan details 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 shows a user 'TU' (Test User) with the role 'Dr' and status 'In Discussion'. A dropdown arrow to the left of the user name and a three-dot menu to the right of the row are circled in red. The three-dot menu is open, showing options: 'Lock down', 'Enter mediation', 'Delete job plan', and 'Copy job plan'.

Title	Name	Surname	Role	Reg. no	Staff no	Start Date	End Date	Department	Status	Total PAs	Core PAs	EPA	Clinical (%)
Dr	Test	Example	Consultant			01 Apr 2024		Test Admin	In Discussion	10.0000	10.0000	0.0000	60

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

NoYes

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

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

▼

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

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

More actions

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”

example

Q

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
							⋮ Publish new Republish last

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 < >

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)

15.2 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 1st 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:

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

								example	Q
TU	Dr	Test	Example	Consultant	Reg. no	Staff no			
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		
								⋮ Republish job plan Edit and republish job plan Copy job plan	

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 < >

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”.

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									
example									
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 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.

44

16. New Starter Job Plan Process

Hiring managers can request for an account to be created for a new employee in advance of the employee starting their post by contacting HRMDS via HR Service Now. This allows an account and job plan to be created for the doctor in advance which can then be sent to the doctor and HR to help in the recruitment process.

Once the doctor has been added to eESS (HR employee system) and/or has been assigned an NHSL email address, they or their manager can contact HR via HR service now for login details to be created.

These details will come from the email noreply@allocatehealthsuite.com.

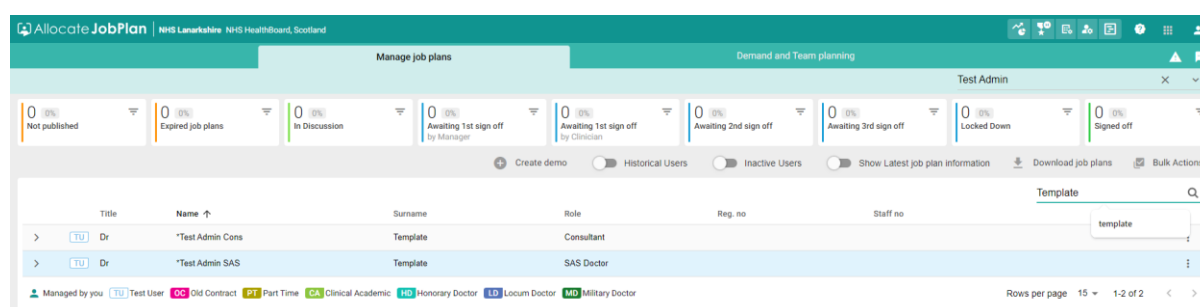
If contact is not made in advance, HR will endeavour to add doctors to the system once they have started in post and added to eESS, however we will likely not be informed of their email address and would be unable to send login details until the doctor or their manager has contacted HR.

16.1 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 1st sign off for each department and have been created to allow job plan to be customised for new employees prior to them starting employment where a request has not been made to create the doctor an account. 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.



Allocate JobPlan | NHS Lanarkshire | NHS HealthBoard, Scotland

Manage job plans | Demand and Team planning | Test Admin

0 Not published | 0 Expired job plans | 0 In Discussion | 0 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 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	Template	
▼	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

Lock down | Delete job plan | **Copy job plan**

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

Copy Job Plan

*Test Admin Cons Template

*Test Admin Cons Template

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

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.