SARD

Great Technology | Great Customer Service

Job Planning

User Guide

Medical Revalidation

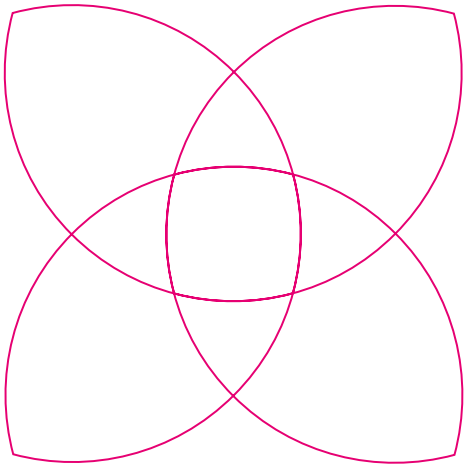
360

Job Planning

eLeave

Nurse Revalidation

Appraisal 4 All



Job Planning User Guide

1 General info 1
2 Signatories 1
3 Timetable 1
4 How to enter an activity 2
5 Advanced options 6
6 Variations 8
7 What if I have a flexible activity? 9
8 Breakdown view 10
9 Weekly Calendar view 10
10 Clashing Activities view 11
11 Signing off and completing your job plan 12

Contact SARD

Get in touch with us
If you have any questions or feedback, please contact us either by phone or email

0208 771 4153 or 07441 906 342
info@sardjv.co.uk
www.sardjv.co.uk

Where to find us / write to us:
Suite 2B
25-27 Westow Street
London
SE19 3RY

Job Planning User Guide

Clicking on the 'My Job Plan' tab at the top of your dashboard will take you to your latest job plan. If you do not have a job plan open, you can start a new one via the dashboard.

First, read the instructions page for an overview of the job planning process and how the job planning system works. Then work through the sections in order, navigating from page to page using the numbered headings at the left of the screen.

1 General info

This section concerns your role and the type of contract you are employed under. If you are unsure of any of the answers, you should be able to get the information from your HR department or job planning administrator. Once you have completed the section, click 'save'.

2 Signatories

This is where you select the people who are required to review and sign off your job plan. Depending on your role and trust, certain signatures are mandatory. Select the appropriate signatories from the drop-down lists and click the green 'Add' button. If you wish to add additional signatories that do not fall under the mandatory lists, click the 'Add Signatory' button at the bottom right of the page and fill in their details manually, clicking 'Save' once you have done so.

3 Timetable

This is the biggest part of the job plan, as it is where you enter your activities to build your average weekly PA calculations, as per your contract.

To fill in your timetable, you need to think of the type of work you do and the frequencies with which you do them. Examples of activities could be:

A clinic that takes place every Monday from 9am to 1pm.

A ward round that takes place on the second Tuesday of every month between 8am and 11am.

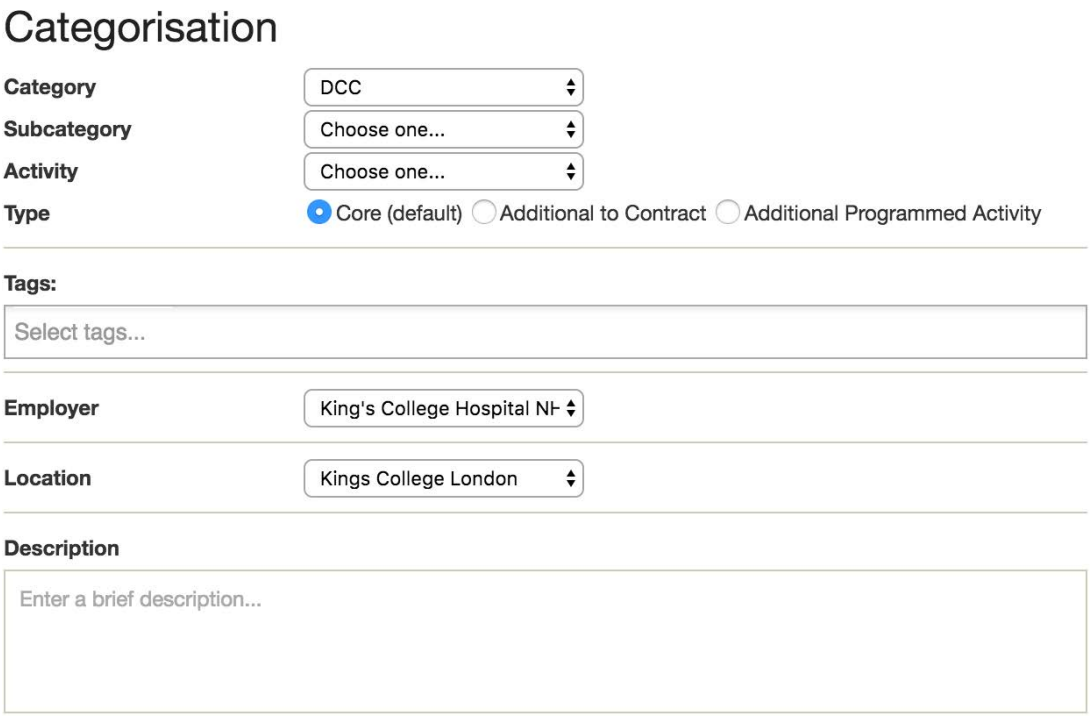
A multidisciplinary meeting that takes place every other Wednesday at 1pm till 2pm

As you enter activities, the system automatically calculates the average weekly PAs and populates the Weekly Calendar, so you can see how your work is spread across the year.

4 How to enter an activity

Click the green 'New Activity' button to open the new activity form.

The options on the first area of the form may vary depending on your trust:



Click on the drop-down lists to choose the best fit for your activity. Typical activity categories may be:

DCC = Direct Clinical Care

SPA = Supporting Professional Activities

AR = Additional Responsibility

ED = External Duty

APA = Additional Programmed Activity

FPS = Fee Paying Services

PRIV = Private

TRAV = Travel

MS = Medical School

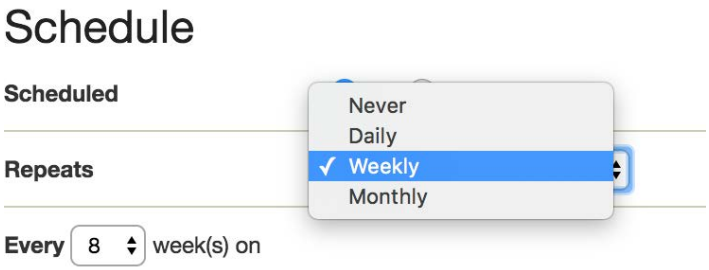
Enter a brief description to explain the type of activity, eg “Bronchial ward round”

Assuming your activity is scheduled (i.e. it is done on a regular basis, at predictable times), you now need to fill in the ‘When does it happen” area. Here you can specify a number of different arrangements, even if your activity schedule is quite complex.

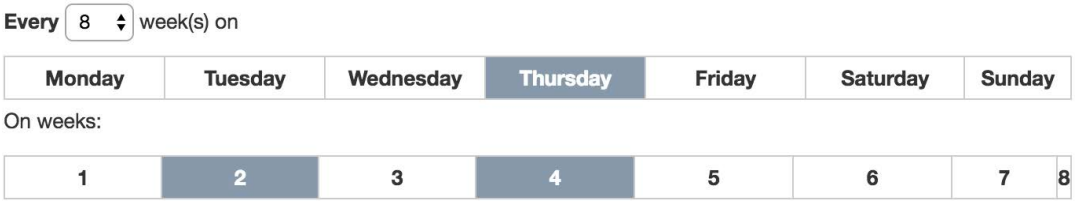
Let’s use an example:

Doctor Strange has a clinic on the 2nd and 4th weeks of an 8 week cycle. It always falls on a Thursday, and takes place between 2pm and 5pm.

Firstly, you need to select how often it repeats. This activity is undertaken on a pattern of weeks, so you would select ‘Weekly’. It falls into an 8 week cycle, so you would then specify that it takes place ‘Every 8 weeks’:



These options will cause a number of day and week boxes to appear below. Highlight as many of the days and weeks as are necessary. For our example, we need to say that it happens on a Thursday, on the second and fourth weeks of the eight week cycle:



Enter the start and finish times using the 24 hour clock:

Start Time	14 : 00
End Time	17 : 00

To view the updated PA calculation, click Save and Recalculate. The Summary will recalculate to show a breakdown of hours and PAs per Occurrence, Worked Week and Year:

Summary

Per Occurrence	Non-Premium Time
Hours Worked	3
PAs Accumulated	0.75

Per Worked Week	Non-Premium Time
Occurrences	0.269
Hours Worked	0.808
PAs Accumulated	0.202

Per Year	Non-Premium Time
Occurrences	Prospective Cover over 52 weeks? ☐ 11.308
Hours Worked	33.923

What does Prospective Cover mean?

All non-premium PAs are, by default, calculated based on a 42 week year. Doctors get 10 weeks of annual and study leave, so these aren't counted in your average year. A standard weekly PA would be calculated as (hours per week x 42) divided by 4. Prospective cover assumes that during your working year you will be working extra shifts to cover the annual and study leave of your other team members, so it essentially says that you will be working a full 52 weeks worth of shifts, but compressed into a 42 week working year - this is compensated for with an increased PA for that activity.

A non-premium prospective cover PA would therefore be calculated as (hours per week x 52) divided by 42, divided by 4.

Summary

Per Occurrence	Non-Premium Time
Hours Worked	3
PAs Accumulated	0.75

Per Worked Week	Non-Premium Time
Occurrences	0.269
Hours Worked	0.808
PAs Accumulated	0.202

Per Year	Non-Premium Time
Occurrences	Prospective Cover over 52 weeks? ☑ 14
Hours Worked	42

How do I Annualise?

The job planning module automatically calculates how often a work item occurs over 42 weeks - this is the basis of an annualised job plan, so SARD is annualised by default. Example: if you do Ward rounds for 4 hours every 5th Monday of the month, the job plan will calculate how many 5th Mondays there are in a working year (42 weeks). If you wish to override this and say specifically how many occurrences there are in the 42 weeks, this can be done using the 'override occurrences' button. Annualising basically means defining something by how many times it occurs per year.

Also see:
http://www.nhsemployers.org/~/media/Employers/Documents/Pay%20and%20reward/Annualised_job_planning_aw_050309.pdf

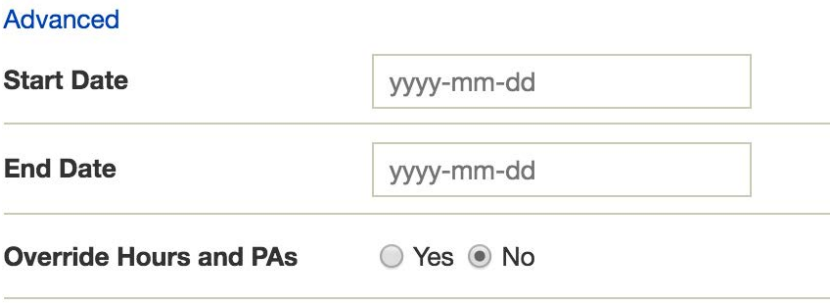
Override Occurrences

Per Year, Ignoring Leave	Non-Premium Time
Occurrences (if no leave were taken)	Override? ☑ 52
Hours Worked (if no leave were taken)	42

In our example we don't override the number of occurrences.

5 Advanced options

For certain activities, you may need to click 'Advanced' to open up two more fields:

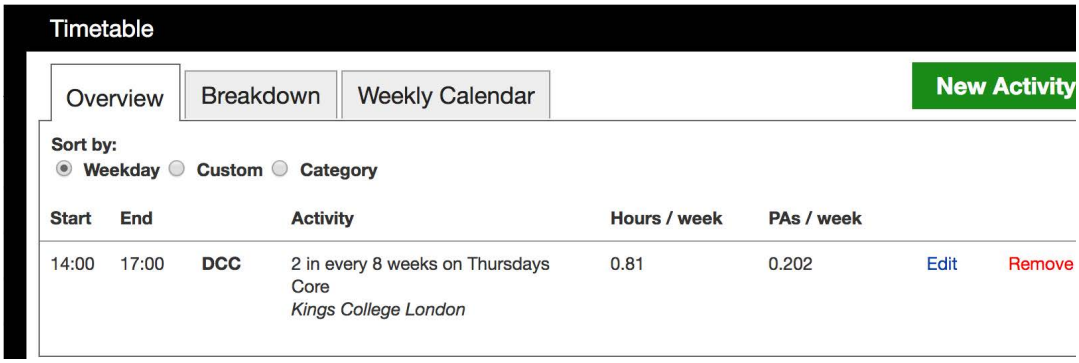


A date range can be applied if the particular activity is only going to take place for part of a year - for example, if you are only going to be doing a particular clinic for a few months over the summer.

The system automatically calculates the hours and PAs to allocate to the activity you have entered. However, if you have a particular reason why you are eligible for more or fewer PAs than the normal rate, you can click 'yes' to override the calculations and manually enter the hours and PAs.

Our example does not require any of the advanced options, so we can ignore these questions and just click 'Create' to finish entering this activity.

Once the activity has been saved, it will appear on the 'Overview' page. Our example looks like this:



The system has automatically calculated the hours and PAs, averaged over the 42 week year.

These figures also appear cumulatively on the Activity Summary to the left of the screen:

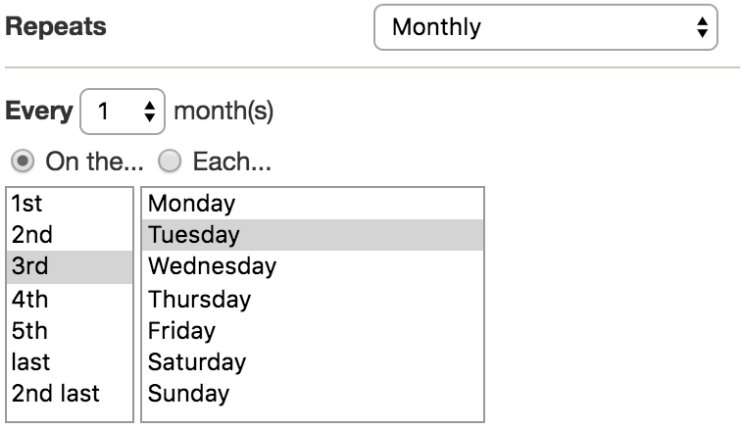
Activity Summary

	Hours	PAs
DCC	0.81	0.202
SPA	0	0
AR	0	0
ED	0	0
TRAV	0	0
FPS	0	0
MS	0	0
PRIV	0	0
Core	0.81	0.202
APA	0	0
ATC	0	0
Total	*0.81*	*0.202*
Total - ATC	*0.81*	*0.202*

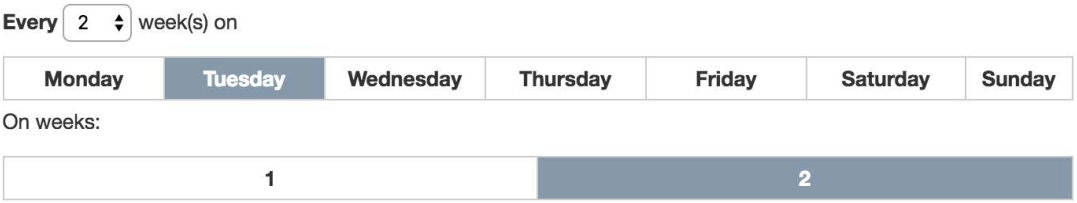
Carry on adding activities in this way until you have entered all your scheduled activities.

6 Variations

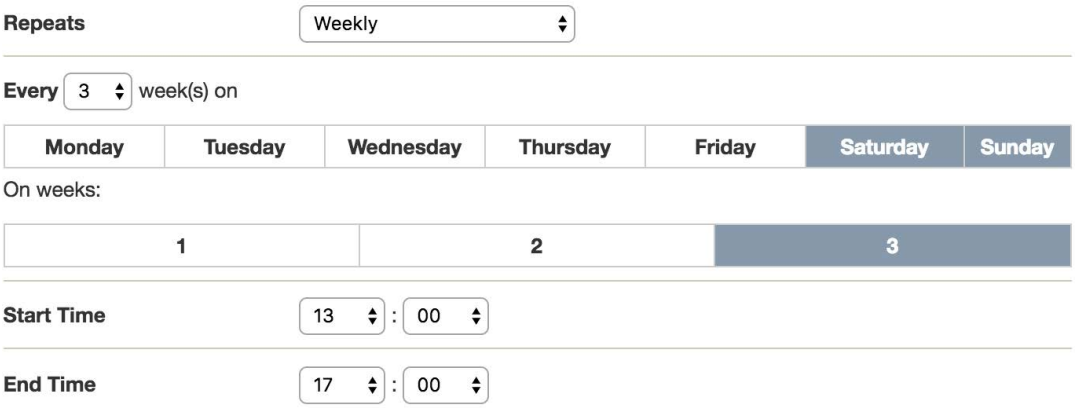
The timetable supports many different schedules. Perhaps you have a meeting on the third Tuesday of every month? You would select 'Monthly' and highlight the fields as follows:



Or an educational supervisory session that happens every fortnight, on a Tuesday:



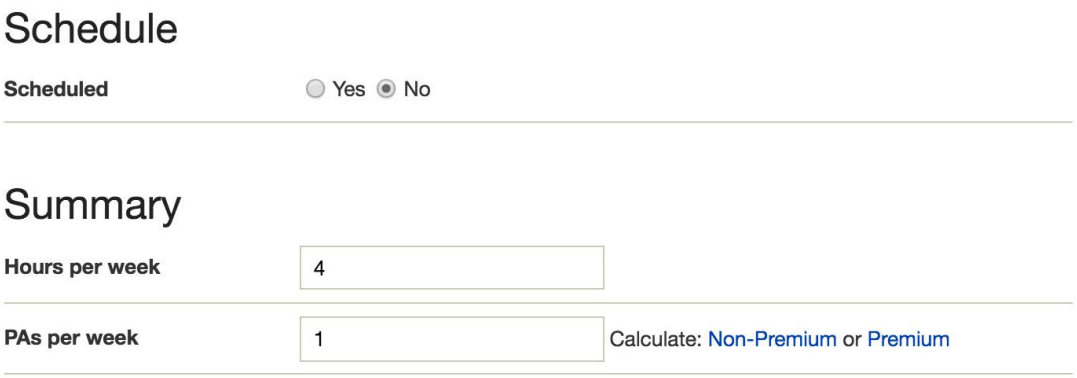
Or, you are on call for 4 hours every third Saturday and Sunday:



7 What if I have a flexible activity?

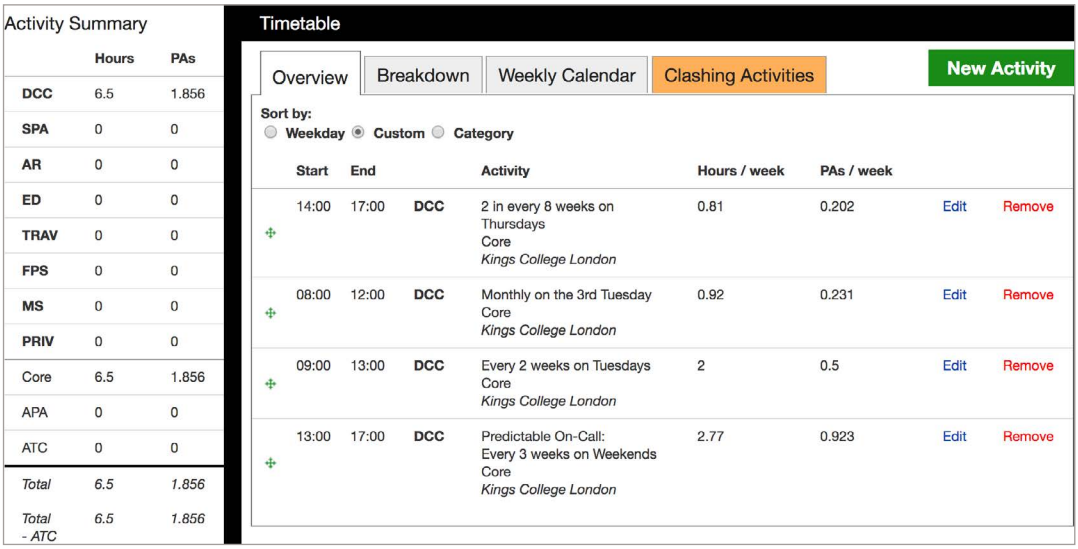
You may have activities for which you earn PAs but which are performed 'ad hoc', rather than at specific times. For example, you do four hours of admin per week, for which you earn 1 SPA, but you fit this in where you can around other work.

You would enter this as an unscheduled activity as follows:



You can click Non-Premium or Premium to calculate the PAs for the entered number of hours. This will add the PAs and hours to your overview list and activity summary without the need to schedule them specifically.

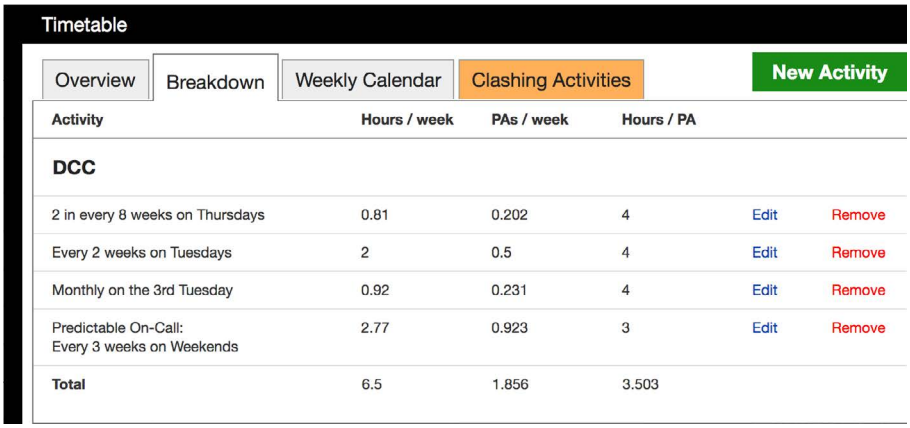
As you build up the timetable, you will see the Overview of activities and Activity Summary begin to build:



You can edit an activity at any time by pressing **Edit** or delete one entirely by clicking **Remove**

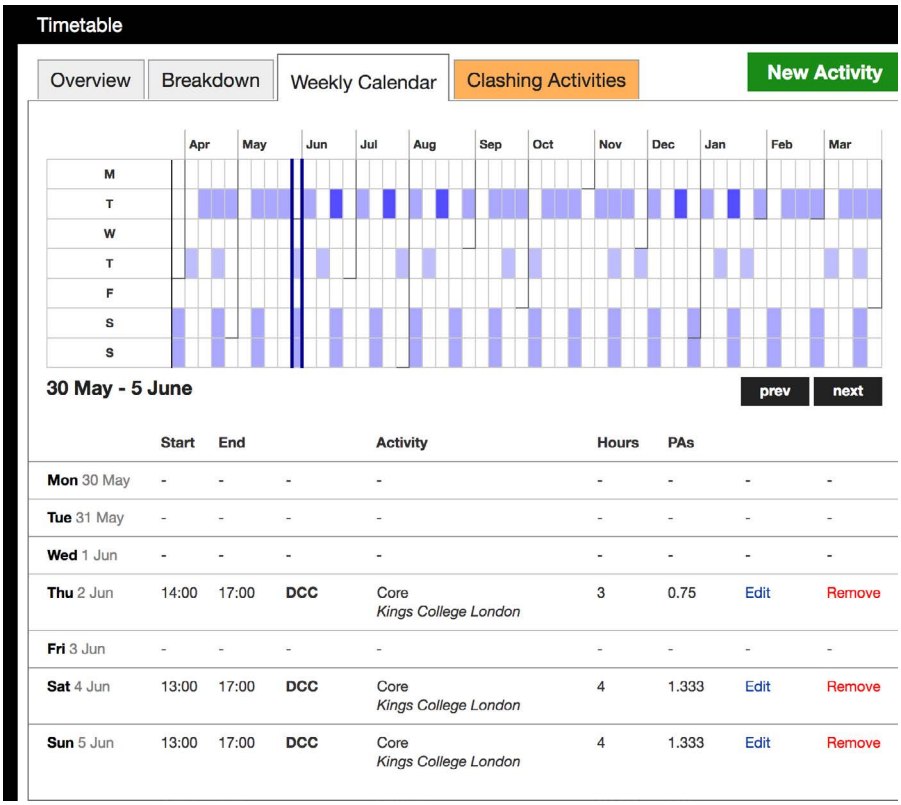
8 Breakdown view

Clicking the 'Breakdown' tab opens the breakdown view, where you can see a summary and check the calculations.



9 Weekly Calendar view

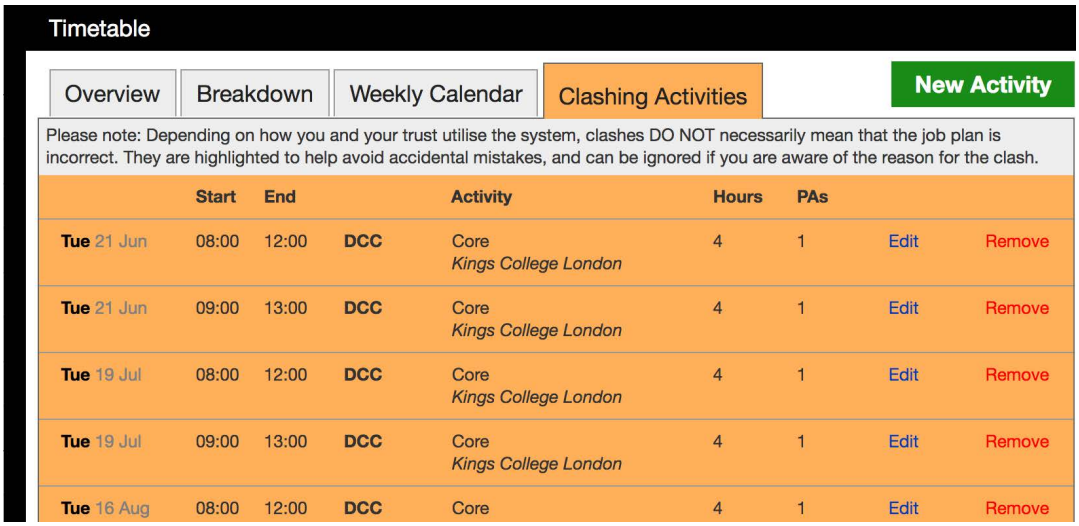
Clicking the 'Weekly Calendar' tab opens the calendar view, where you can scroll through the year to see what a particular week's work might look like:



The hours and PAs on this view reflect the actual PAs and hours worked in that particular week, rather than the averaged-out figure on the main page.

10 Clashing Activities view

If you add activities that occur at the same time, they will appear in the 'Clashing Activities' tab. You can see the first 10 instances of overlap in the year, and decide whether to update the activities to fit the reality, or whether to leave the job plan as it is.



11 Signing off and completing your job plan

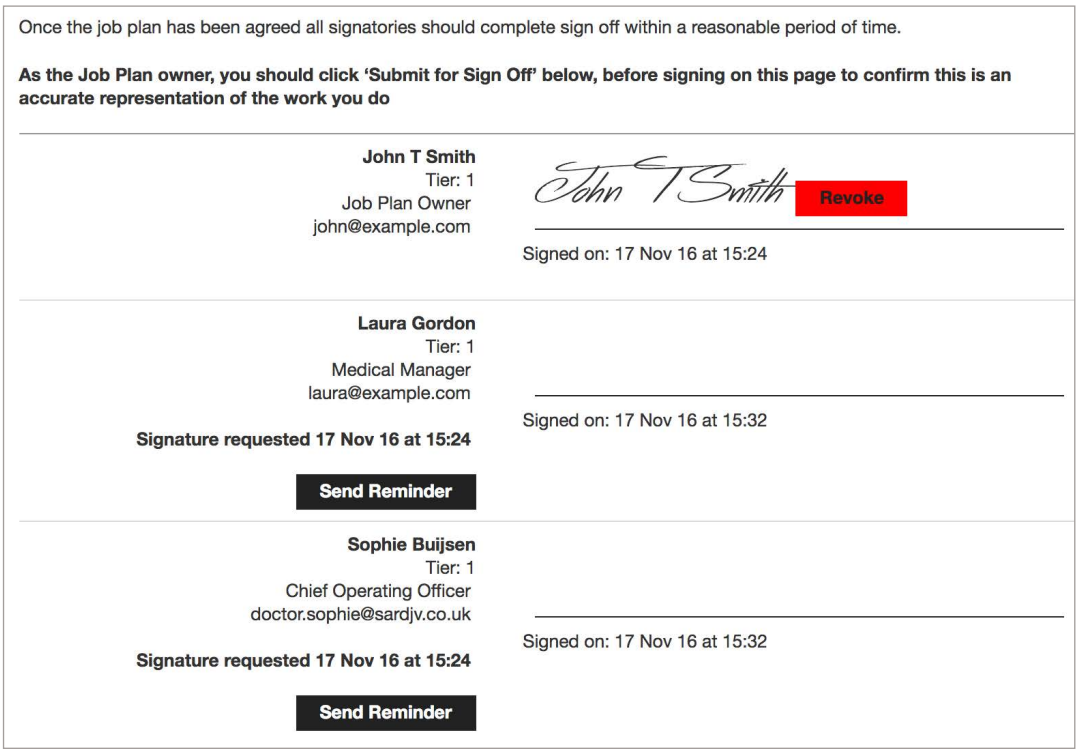
Once you are happy that your activities and activity summary are all correct, you should work through the remaining sections, 4 - 13, following the instructions on each page. These pages are where you record things like your On Call Supplements, any additional agreements etc.

Once you are ready, you can click 'Send for Sign Off' to submit your job plan for review.

This will send a notification email to your signatories, who will now be able to access your job plan and sign it off.

The status in the top right of the screen will change from DRAFT to SUBMITTED

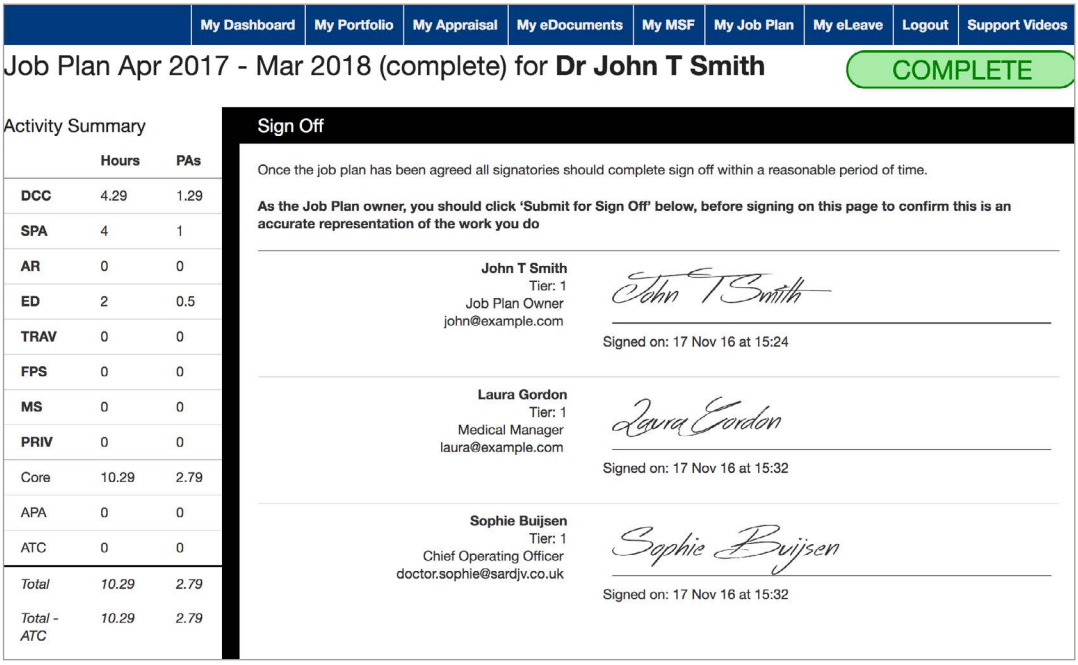
You can now go to section 14 and click 'Sign' next to your name to sign off. The other signatories will soon do the same. If a signatory is taking a long time to sign, you can click 'Send Reminder' to send them a reminder email.



It is possible to change the job plan while it is in this submitted state, provided not all of the signatories have signed off. Please note that if the job plan is changed, it will send an email notification to all signatories and will revoke existing signatures, so they will need to review the change and re-sign.

If significant or multiple changes are required, you can revoke the whole job plan to draft using the button on the left of the screen and re-submit it once you are ready.

Once all the signatories have signed, the job plan will switch from SUBMITTED to COMPLETE and can now no longer be changed. You have finished your job plan!



You can access your completed job plan at any time by going to your main SARD dashboard and scrolling down to the Job Plans section. If you wish, you can also use the green button below the activity summary to download a copy to PDF.

As usual let us know if you have any questions or comments via the live chat system or via email at support@sardjv.co.uk.

Our promise is simple:
Great Technology and
Great Customer Service.

SARD

Great Technology | Great Customer Service

www.sardjv.co.uk