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User Guide

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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.

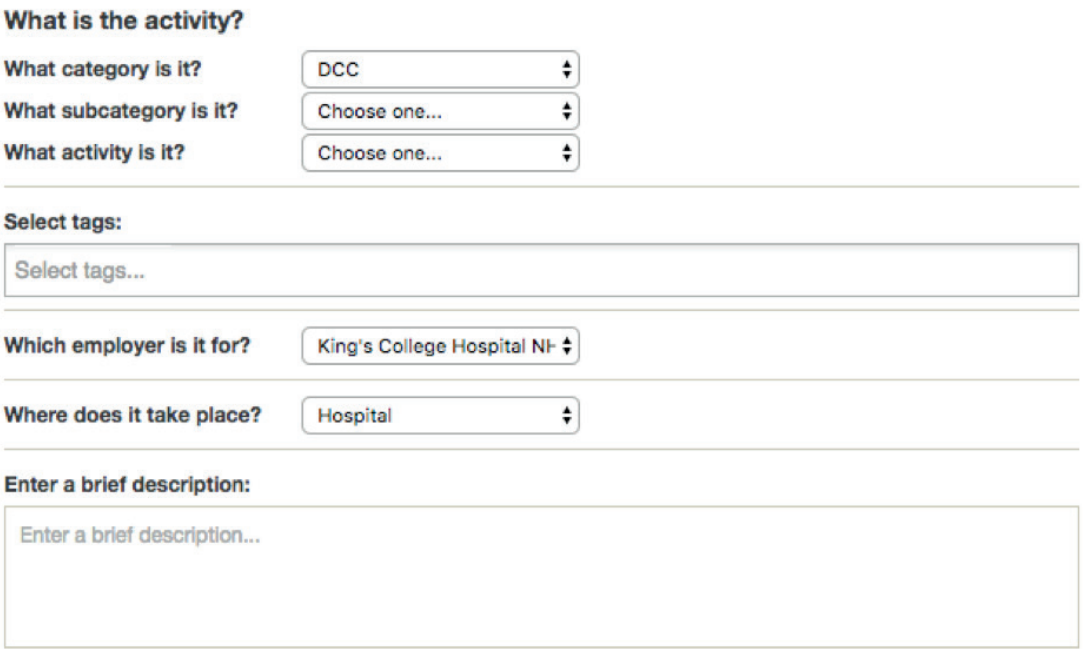
A multidisciplinary meeting that takes place every other Wednesday at 1pm till 2pm

As you enter activities, the system automatically calculates the average weekly PAs and populates the Weekly Calendar, so you can see how your work spreads 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 = Special Programmed Activity

AR = Additional Responsibility

ED = External Duty

APA = Additional Programmed Activity

FPS = Fee Paying Services

PRIV = Private

TRAV = Travel

MS = Medical School

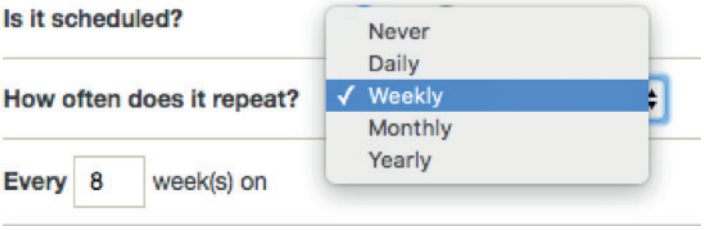
Enter a brief description to explain the type of activity, eg “Bronchial ward round”

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.

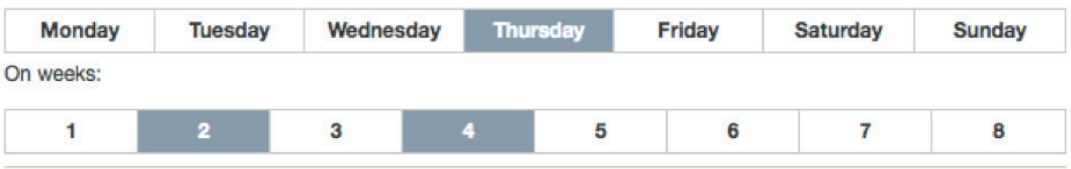
Let’s use an example:

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:

You then need to decide if this event is annualised. If you select 'Yes', you will need to enter how many worked occurrences happen per year. Most activities are not annualised.

What does annualisation mean?

The job planning module automatically calculates how often a work item occurs. For 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 42 week working year. When annualisation is switched on, you can override this and indicate how often the work item occurs.

For example: you have a meeting on the 15th of every month, but on three months of the year the 15th falls on a weekend day so the meeting wouldn't happen. Therefore you would say that this activity is annualised, and specify that you do it 9 times per year.

You should annualise an event only if it can be defined by the number of times it occurs in a year.

More information on annualisation can be found here: http://www.nhsemployers.org/~/media/Employers/Documents/Pay%20and%20reward/Annualised_job_planning_aw_050309.pdf

If you are unsure whether an activity should be annualised, you should check with your job planning administrator.

Our example is not annualised, so we select 'No', and move on to whether it is prospective cover.

What does Prospective Cover mean?

All PAs are calculated based on a 42 week year–this allows for 10 weeks of annual and study leave. Prospective cover overrides this and divides the PA over a full 52 weeks. This applies if the activity is worked in a rota or team system where you would be required to cover for your colleagues' absences on annual, study or sick leave.

In our example, this is not the case as Dr Strange works alone.

5. Advanced options

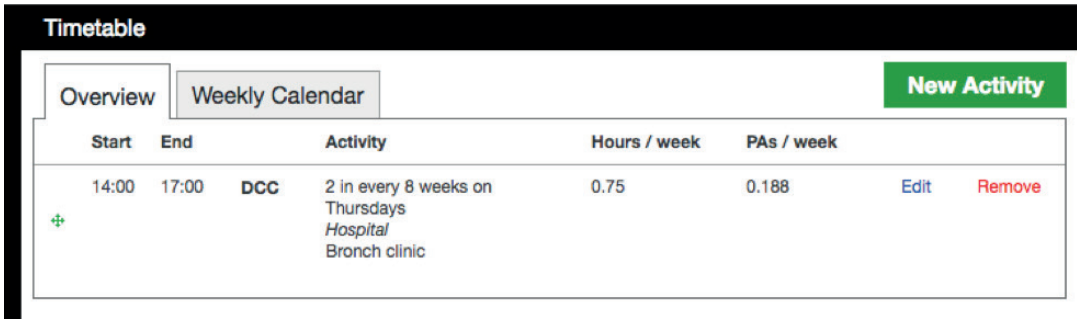
For certain activities, you may need to click 'Advanced' to open up two more fields:

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:

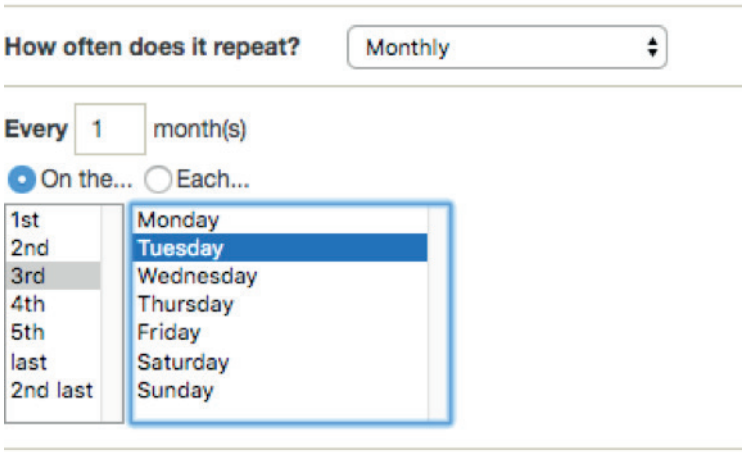
Activity Summary

	Hours	PAs
DCC	0.75	0.188
SPA	0.00	0.000
AR	0.00	0.000
ED	0.00	0.000
APA	0.00	0.000
PRIV	0.00	0.000
TRAV	0.00	0.000
FPS	0.00	0.000
MS	0.00	0.000
Total	*0.75*	*0.188*

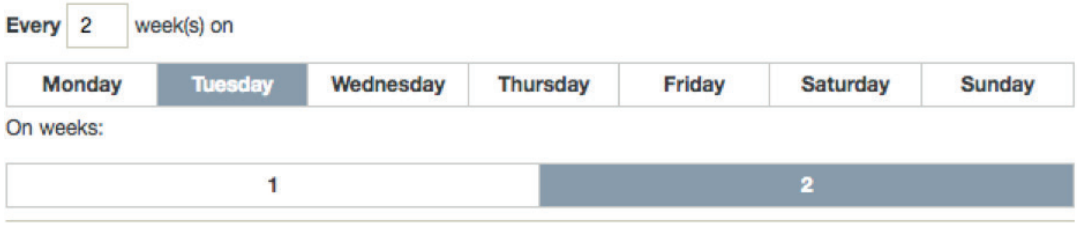
Carry on adding activities in this way until you have entered all your scheduled activities.

6. Variations

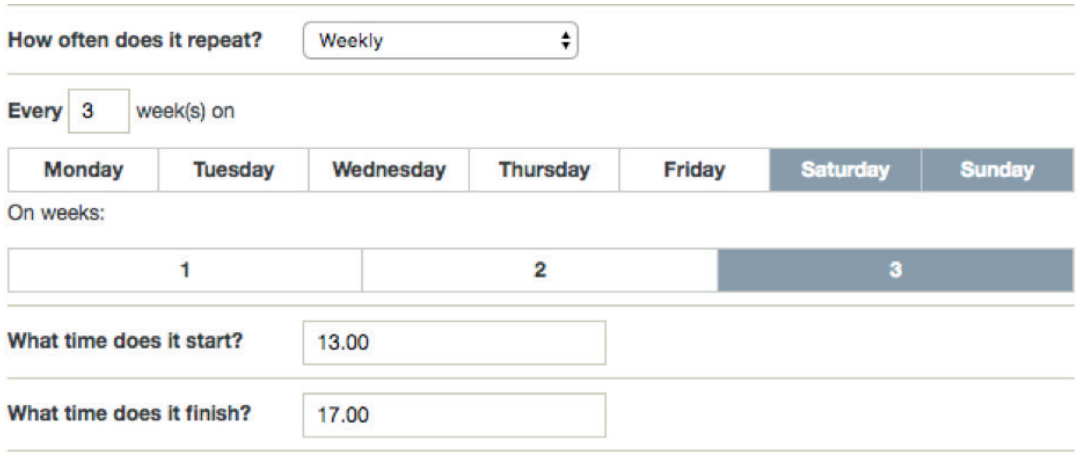
The timetable supports many different schedules. Perhaps you have a meeting on the third Tuesday of every month? You would select 'Monthly' and highlight the fields as follows:



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



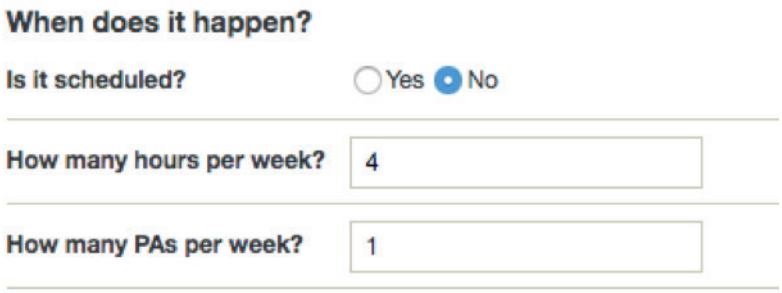
Or, you are on call for 4 hours every third Saturday and Sunday:



7. What if I have a flexible activity?

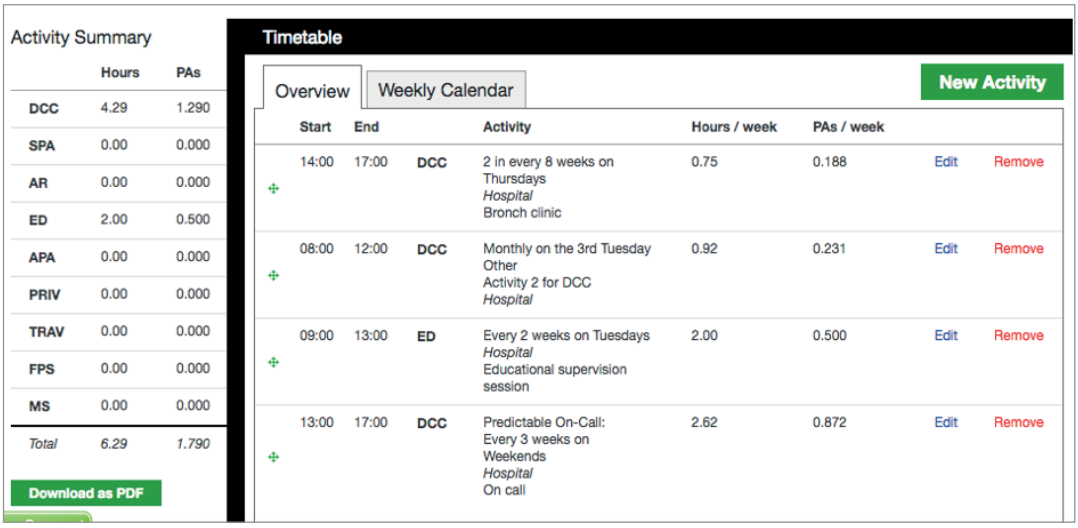
You may have activities for which you earn PAs but which are performed 'ad hoc', rather than at specific times. For example, you do four hours of admin per week, for which you earn 1 SPA, but you fit this in where you can around other work.

You would enter this as an unscheduled activity as follows:



This will add the PAs and hours to your overview list and activity summary without the need to schedule them specifically.

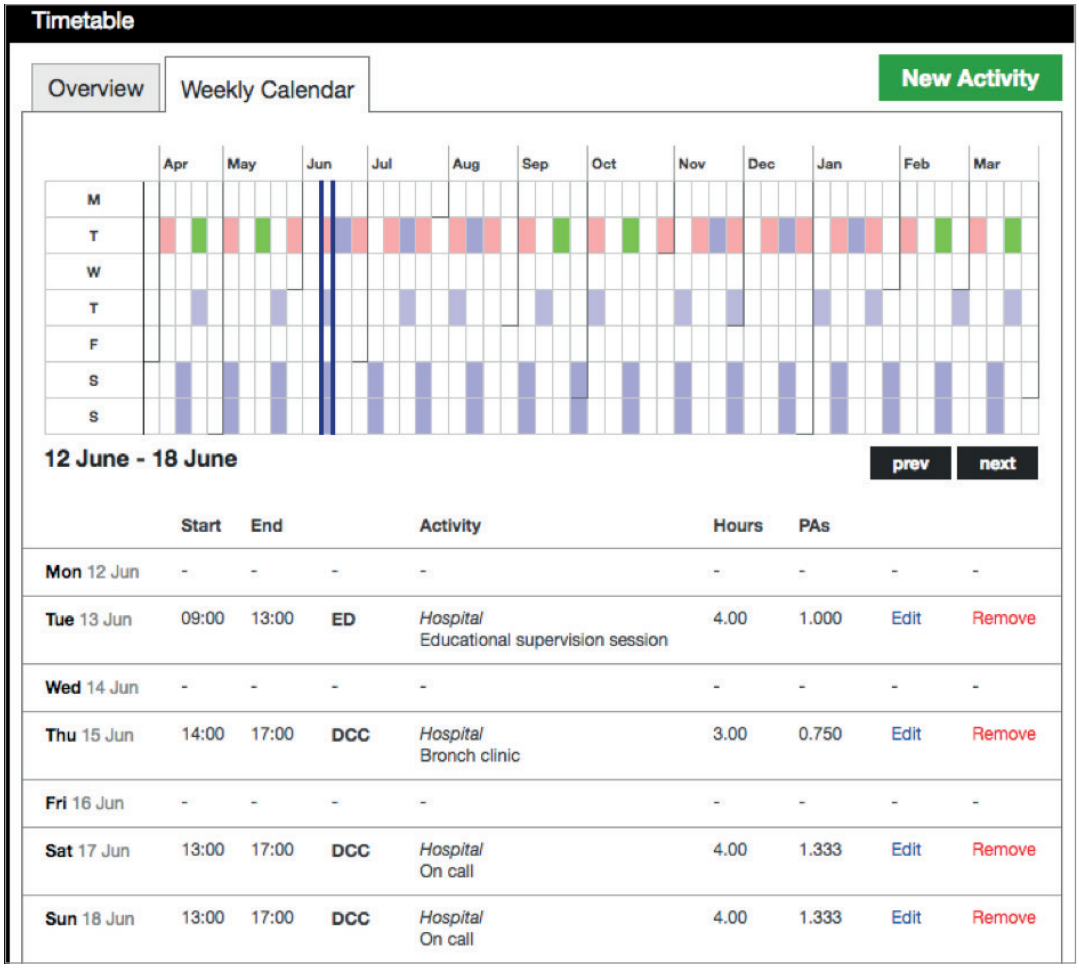
As you build up the timetable, you will see the Overview of activities and Activity Summary begin to build:



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

8. 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:



	Start	End		Activity	Hours	PAs		
Mon 12 Jun	-	-	-	-	-	-	-	-
Tue 13 Jun	09:00	13:00	**ED**	*Hospital* Educational supervision session	4.00	1.000	Edit	Remove
Wed 14 Jun	-	-	-	-	-	-	-	-
Thu 15 Jun	14:00	17:00	**DCC**	*Hospital* Bronch clinic	3.00	0.750	Edit	Remove
Fri 16 Jun	-	-	-	-	-	-	-	-
Sat 17 Jun	13:00	17:00	**DCC**	*Hospital* On call	4.00	1.333	Edit	Remove
Sun 18 Jun	13:00	17:00	**DCC**	*Hospital* On call	4.00	1.333	Edit	Remove

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.

9. Signing off and completing your job plan

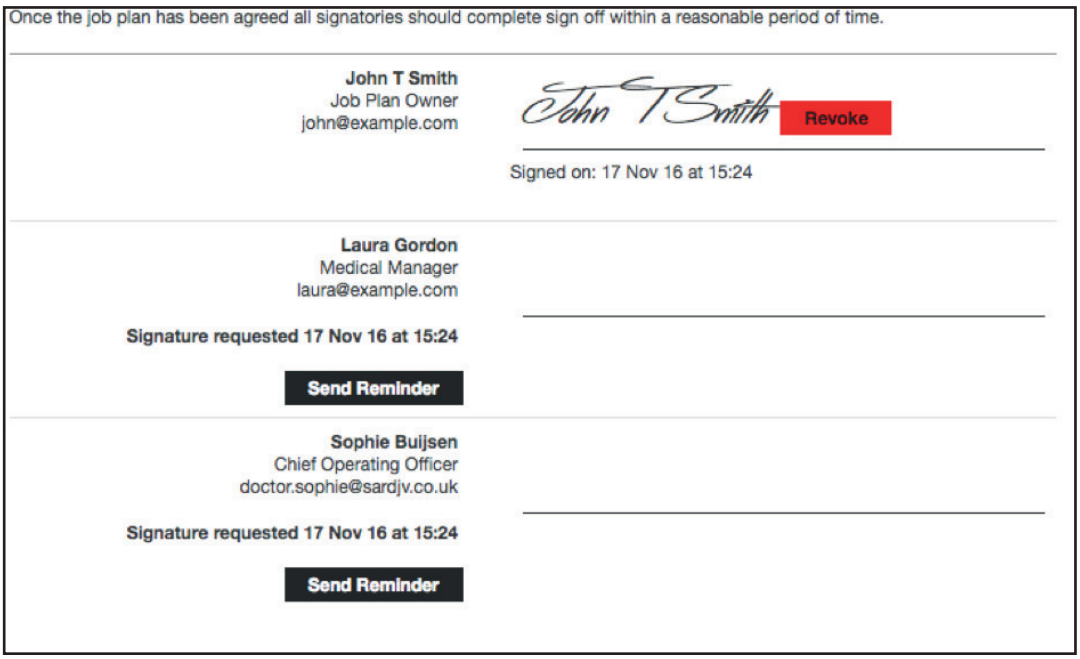
Once you are happy that your activities and activity summary are all correct, you should work through the remaining sections, 4–13, following the instructions on each page. These pages are where you record things like your On Call Supplements, any additional agreements etc.

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

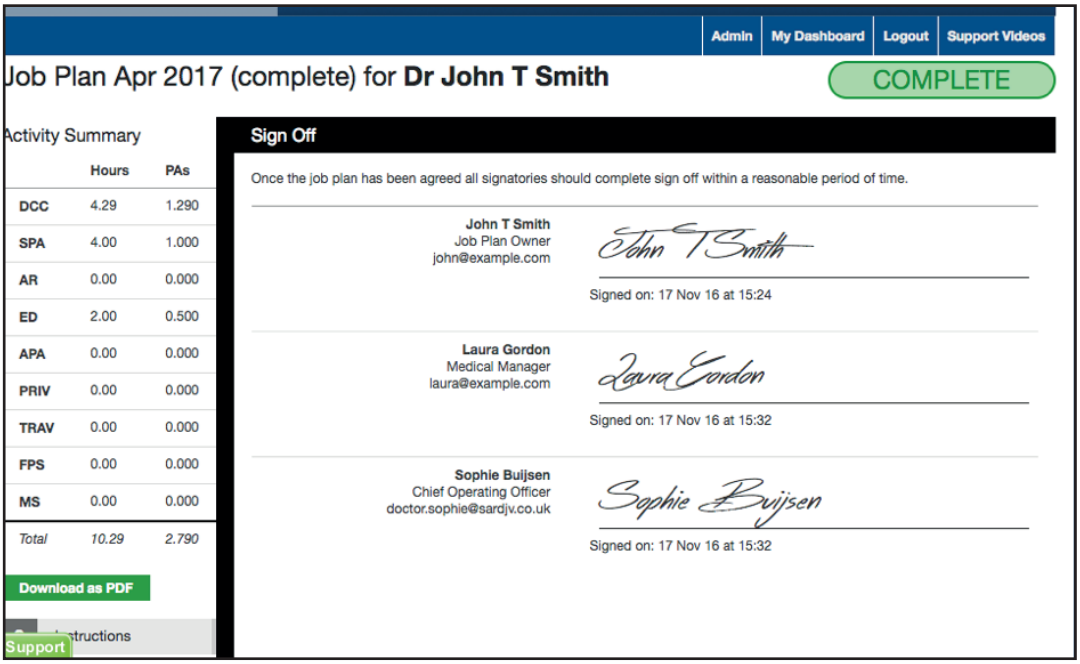
You can now go to section 14 and click 'Sign' next to your name to sign off. The other signatories will soon do the same. If a signatory is taking a long time to sign, you can click 'Send Reminder' to send them a reminder email.



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.

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