



# Job Planning User Guide

Medical Revalidation 

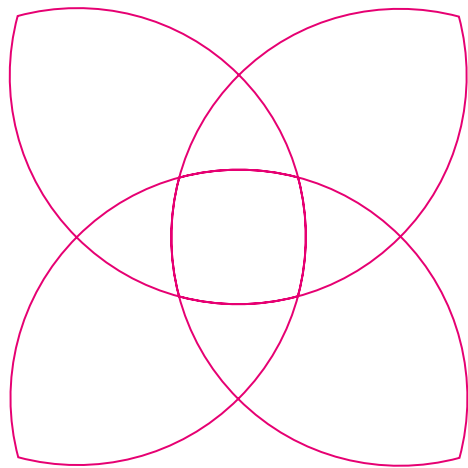
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Job Planning 

eLeave 

Nurse Revalidation 


Appraisal 4 All 





## Contact SARD

### Get in touch with us

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# Job Planning 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 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:

### Categorisation

<b>Category</b>	<input type="text" value="DCC"/>
<b>Subcategory</b>	<input type="text" value="Choose one..."/>
<b>Activity</b>	<input type="text" value="Choose one..."/>
<b>Type</b>	<input checked="" type="radio"/> Core (default) <input type="radio"/> Additional to Contract <input type="radio"/> Additional Programmed Activity

---

**Tags:**

Select tags...

---

<b>Employer</b>	<input type="text" value="King's College Hospital NF"/>
<b>Location</b>	<input type="text" value="Kings College London"/>

---

**Description**

Enter a brief description...

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’:

## Schedule

**Scheduled**

---

**Repeats**

Never  
 Daily  
 Weekly  
 Monthly

**Every**  week(s) on

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:

**Every**  week(s) on

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
On weeks:						
1	2	3	4	5	6	7
						8

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? <input type="checkbox"/> 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? <input checked="" type="checkbox"/> 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 a 52 week year, 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](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? <input checked="" type="checkbox"/> 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:

### Advanced

<b>Start Date</b>	<input type="text" value="yyyy-mm-dd"/>
<b>End Date</b>	<input type="text" value="yyyy-mm-dd"/>
<b>Override Hours and PAs</b>	<input type="radio"/> Yes <input checked="" type="radio"/> No

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:

Timetable								
Overview						Breakdown	Weekly Calendar	New Activity
Sort by:								
<input checked="" type="radio"/> Weekday <input type="radio"/> Custom <input type="radio"/> Category								
Start	End		Activity	Hours / week	PAs / week			
14:00	17:00	DCC	2 in every 8 weeks on Thursdays Core Kings College London	0.81	0.202	<a href="#">Edit</a>	<a href="#">Remove</a>	

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
<b>DCC</b>	0.81	0.202
<b>SPA</b>	0	0
<b>AR</b>	0	0
<b>ED</b>	0	0
<b>TRAV</b>	0	0
<b>FPS</b>	0	0
<b>MS</b>	0	0
<b>PRIV</b>	0	0
Core	0.81	0.202
APA	0	0
ATC	0	0
<i>Total</i>	<i>0.81</i>	<i>0.202</i>
<i>Total - ATC</i>	<i>0.81</i>	<i>0.202</i>

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:

**Repeats** Monthly

---

**Every** 1 month(s)

On the...  Each...

1st	Monday
2nd	Tuesday
3rd	Wednesday
4th	Thursday
5th	Friday
last	Saturday
2nd last	Sunday

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

**Every** 2 week(s) on

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
--------	---------	-----------	----------	--------	----------	--------

On weeks:

1	2
---	---

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

**Repeats** Weekly

---

**Every** 3 week(s) on

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
--------	---------	-----------	----------	--------	----------	--------

On weeks:

1	2	3
---	---	---

**Start Time** 13 : 00

---

**End Time** 17 : 00

## 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:

### Schedule

Scheduled  Yes  No

### Summary

Hours per week

PAs per week  Calculate: [Non-Premium](#) or [Premium](#)

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:

Activity Summary			Timetable						
	Hours	PAs							
DCC	6.5	1.856							
SPA	0	0							
AR	0	0							
ED	0	0							
TRAV	0	0							
FPS	0	0							
MS	0	0							
PRIV	0	0							
Core	6.5	1.856							
APA	0	0							
ATC	0	0							
<b>Total</b>	<b>6.5</b>	<b>1.856</b>							
<b>Total - ATC</b>	<b>6.5</b>	<b>1.856</b>							

Timetable							New Activity	
Overview								
Start	End	Activity	Hours / week	PAs / week				
14:00	17:00	DCC 2 in every 8 weeks on Thursdays Core Kings College London	0.81	0.202	Edit	Remove		
08:00	12:00	DCC Monthly on the 3rd Tuesday Core Kings College London	0.92	0.231	Edit	Remove		
09:00	13:00	DCC Every 2 weeks on Tuesdays Core Kings College London	2	0.5	Edit	Remove		
13:00	17:00	DCC Predictable On-Call: Every 3 weeks on Weekends Core Kings College London	2.77	0.923	Edit	Remove		

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



## 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.

Timetable									
Overview	Breakdown	Weekly Calendar	Clashing Activities				New Activity		
Please note: Depending on how you and your trust utilise the system, clashes DO NOT necessarily mean that the job plan is incorrect. They are highlighted to help avoid accidental mistakes, and can be ignored if you are aware of the reason for the clash.									
	Start	End	DCC	Activity	Hours	PAs	Edit	Remove	
Tue 21 Jun	08:00	12:00	DCC	Core Kings College London	4	1	<a href="#">Edit</a>	<a href="#">Remove</a>	
Tue 21 Jun	09:00	13:00	DCC	Core Kings College London	4	1	<a href="#">Edit</a>	<a href="#">Remove</a>	
Tue 19 Jul	08:00	12:00	DCC	Core Kings College London	4	1	<a href="#">Edit</a>	<a href="#">Remove</a>	
Tue 19 Jul	09:00	13:00	DCC	Core Kings College London	4	1	<a href="#">Edit</a>	<a href="#">Remove</a>	
Tue 16 Aug	08:00	12:00	DCC	Core	4	1	<a href="#">Edit</a>	<a href="#">Remove</a>	

## 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.

Once the job plan has been agreed all signatories should complete sign off within a reasonable period of time.




**As the Job Plan owner, you should click 'Submit for Sign Off' below, before signing on this page to confirm this is an accurate representation of the work you do**

<p><b>John T Smith</b> Tier: 1 Job Plan Owner john@example.com</p>	 <span style="background-color: red; color: white; padding: 2px 5px;">Revoke</span>
<p><b>Laura Gordon</b> Tier: 1 Medical Manager laura@example.com</p> <p><b>Signature requested 17 Nov 16 at 15:24</b></p> <p style="text-align: center;"><span style="background-color: black; color: white; padding: 2px 5px;">Send Reminder</span></p>	<hr/> <p>Signed on: 17 Nov 16 at 15:32</p>
<p><b>Sophie Buijsen</b> Tier: 1 Chief Operating Officer doctor.sophie@sardjv.co.uk</p> <p><b>Signature requested 17 Nov 16 at 15:24</b></p> <p style="text-align: center;"><span style="background-color: black; color: white; padding: 2px 5px;">Send Reminder</span></p>	<hr/> <p>Signed on: 17 Nov 16 at 15:32</p>

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.

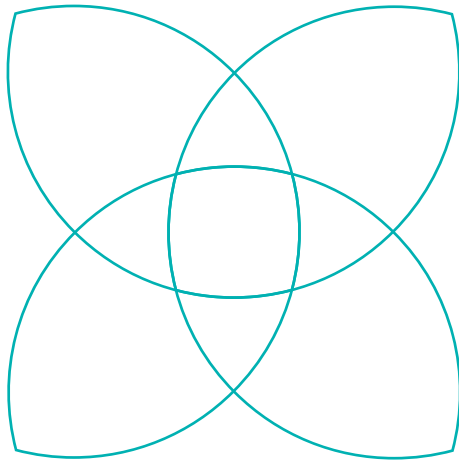
If significant or multiple changes are required, you can revoke the whole job plan to draft using the button on the left of the screen and re-submit it once you are ready.

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!

	My Dashboard	My Portfolio	My Appraisal	My eDocuments	My MSF	My Job Plan	My eLeave	Logout	Support Videos
Job Plan Apr 2017 - Mar 2018 (complete) for Dr John T Smith							<b>COMPLETE</b>		
Activity Summary		<b>Sign Off</b>							
	Hours	PAs	Once the job plan has been agreed all signatories should complete sign off within a reasonable period of time.						
	As the Job Plan owner, you should click 'Submit for Sign Off' below, before signing on this page to confirm this is an accurate representation of the work you do								
DCC	4.29	1.29	<b>John T Smith</b> Tier: 1 Job Plan Owner john@example.com		 Signed on: 17 Nov 16 at 15:24				
SPA	4	1	<b>Laura Gordon</b> Tier: 1 Medical Manager laura@example.com		 Signed on: 17 Nov 16 at 15:32				
AR	0	0	<b>Sophie Buijsen</b> Tier: 1 Chief Operating Officer doctor.sophie@sardjv.co.uk		 Signed on: 17 Nov 16 at 15:32				
ED	2	0.5							
TRAV	0	0							
FPS	0	0							
MS	0	0							
PRIV	0	0							
Core	10.29	2.79							
APA	0	0							
ATC	0	0							
<b>Total</b>	<b>10.29</b>	<b>2.79</b>							
<b>Total - ATC</b>	<b>10.29</b>	<b>2.79</b>							

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](mailto:support@sardjv.co.uk).



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



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