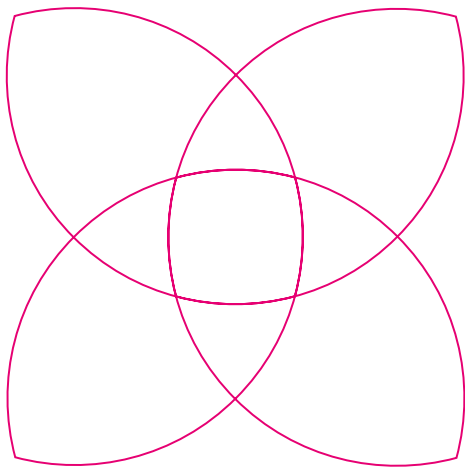




Job Planning User Guide


Job Planning User Guide





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

 info@sardjv.co.uk

 www.sardjv.co.uk

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London
SE19 3RY

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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.

Activity Summary

	Hours	PAs
DCC	8	2
SPA	0.92	0.308
TOTAL	8.92	2.308

Core
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 ATC

[Summary PDF](#)
[Full PDF](#)
[Share as Template](#)

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Timetable

[New Activity](#)

[Overview](#)
[PA Breakdown](#)
[Calendar](#)
[Clashing Activities](#)

Sort: Weekday Category Custom

Start	End	Activity	Hours / week	PAs / week	
Monday					
08:00	11:53	DCC Weekly on Mondays and Wednesdays Other ATC OLD AGE PSYCHIATRY	7.77	1.942	
08:00	12:00	DCC Predictable On-Call: Weekly on Mondays and Wednesdays Core NEUROLOGY	8	2	
Saturday					
08:00	12:00	SPA Monthly on the 2nd Saturday Core NEUROLOGY	0.92	0.308	

ANNUALISATION

The job planning module automatically calculates how often a work item occurs based on a 42 week working year, which allows for bank holidays, leave etc. 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 many times the work item occurs in a 52 week year.

For example: you have a meeting on the 15th of every month, but on three months of the year the 15th

4 How to enter an activity

Click the '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

Category	Direct Clinical Care (DCC) ⌵
Subcategory	Choose one... ⌵
Activity	Choose one... ⌵
Speciality	FORENSIC PSYCHIATRY ⌵
Funding source	Type
<input checked="" type="radio"/> Core (default)	
<input type="radio"/> Additional to Contract	
<input type="radio"/> Additional Programmed Activity	
Tags:	
Select tags...	
Employer	King's College Hospital NHS Foundation Trust ⌵
Location	Hospital ⌵
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

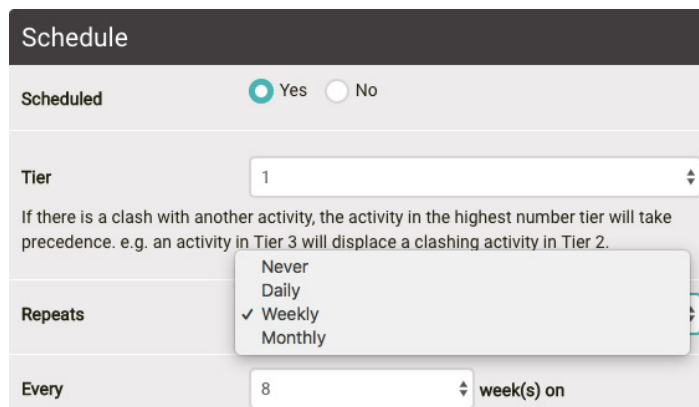
Enter a brief description to explain the type of activity, eg “Bronchial ward round”

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.

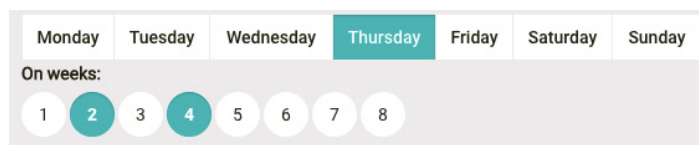
Let’s use an example:

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.

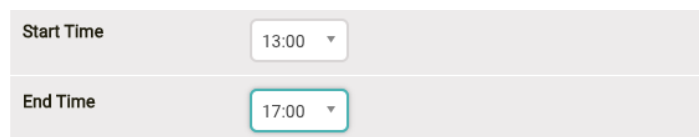
Firstly, you need to select how often it repeats. This activity is undertaken on a pattern of weeks, so you would select ‘Weekly’. It falls into an 8 week cycle, so you would then specify that it takes place ‘Every 8 weeks’:



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:



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	<input type="checkbox"/> Prospective Cover over 52 weeks? 17.231
Hours Worked	51.692

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.

Per Year	Non-Premium Time
Occurrences	<input checked="" type="checkbox"/> Prospective Cover over 52 weeks? 11.308
Hours Worked	33.923
<input checked="" type="checkbox"/> Override Occurrences	
Per Year, Ignoring Leave	Non-Premium Time
Occurrences (if no leave were taken)	<input checked="" type="checkbox"/> Override? 14
Hours Worked (if no leave were taken)	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

Per Year, Ignoring Leave	Non-Premium Time
Occurrences (if no leave were taken)	<input checked="" type="checkbox"/> Override? <input type="text" value="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

Start Date

End Date

Override Hours and PAs Yes 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

New Activity

Overview
PA Breakdown
Calendar
Clashing Activities

Sort: Weekday Category Custom

Filter...

Start	End	DCC	Activity	Hours / week	PAs / week	
14:00	17:00	DCC	2 in every 8 weeks on Thursdays (on weeks 2 and 4) Core Hospital FORENSIC PSYCHIATRY	0.81	0.202	

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

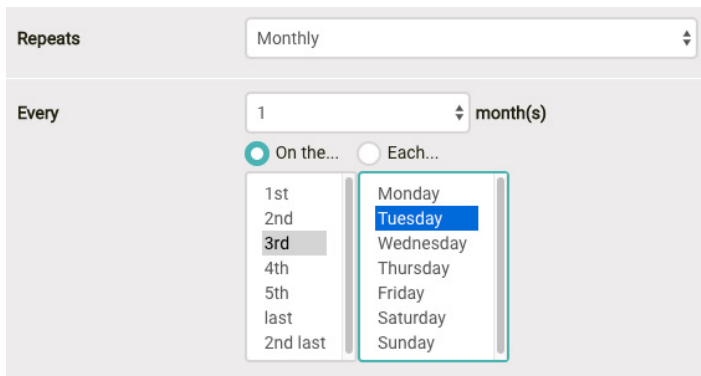
	Hours	PAs
TRAV	4	0.813
DCC	31.48	7.752
MS	1	0.25
SPA	4	1
ED	2	0.406
PRIV	2	0
UNI	0	0
TOTAL	44.48	10.221

Core
 APA
 ATC

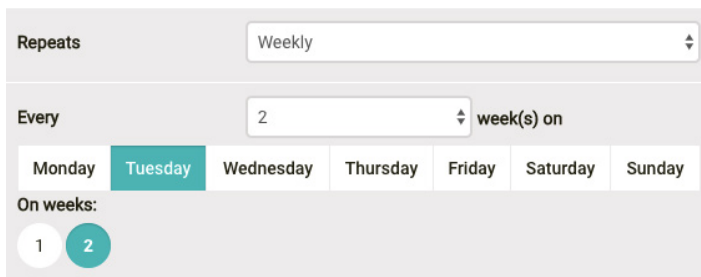
Carry on adding activities in this way until you have entered all your scheduled activities.

6 Variations

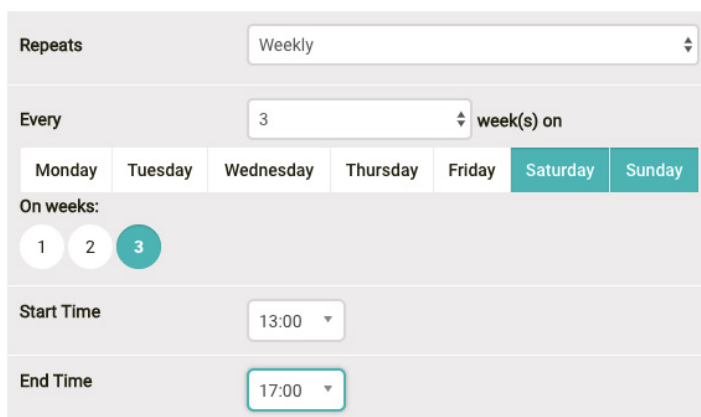
The timetable supports many different schedules. Perhaps you have a meeting on the third Tuesday of every month? You would select 'Monthly' and highlight the fields as follows:



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:

Schedule

Scheduled Yes No

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:

Sort: Weekday Category Custom Filter...

Start	End	Activity	Hours / week	PAs / week	
Monday					
08:30	16:30	DCC Weekly on Mondays and Tuesdays Inpatient Core Ward Round Hospital Morning ward round followed by inpatient individual sessions/tests. ADULT MENTAL ILLNESS	16	4	 
09:00	13:00	ED Predictable On-Call: Every 2 weeks on Mondays PROSPECTIVE COVER Core Hospital ADULT MENTAL ILLNESS	2	0.406	 
09:00	13:00	PRIV 1 in every 2 weeks on Mondays (on week 1) PROSPECTIVE COVER Core Hospital ADULT MENTAL ILLNESS	2	0	 

You can edit an activity at any time by clicking the  icon or delete one entirely by clicking the  icon.

8 Breakdown view

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

Activity	Hours / week	PAs / week	Hours / PA
DCC			
Ward Round	16	4	4
Ward Round	1.62	0.404	4
Inpatient	1	0.25	4
Weekly on Tuesdays	2.02	0.41	5
1 in every 2 weeks on Wednesdays and Fridays (on week 2)	4	1	4
Monthly on the 2nd Thursday	1.15	0.288	4
2 in every 8 weeks on Thursdays (on weeks 2 and 4)	0.81	0.202	4
Every 2 months on the last Friday	0.47	0.096	5
Total	27.07	6.651	

9 Calendar view

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

Overview	PA Breakdown	Calendar	Clashing Activities
April 2018			
Mon	Tue	Wed	Thu
26	27	28	29
2	3	4	5
07:00 PRIV		08:00 DCC 08:00 SPA	
9	10	11	12
07:00 PRIV			09:00 DCC
16	17	18	19
07:00 PRIV	07:00 DCC 08:30 Morning ward rou	08:00 DCC 08:00 SPA	14:00 DCC 14:00 Ward Round
23	24	25	26
07:00 PRIV			
30	1	2	3
07:00 PRIV			

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.





You will have a 'Clashing Activities' tab appear when you have activities occurring at the same time on the calendar. Please note that 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.

You can use 'tiers' to prioritise certain activities so that when the two DO clash, one can take precedence.

If two activities clash, the activity in the highest number tier will take precedence. e.g. an activity in Tier 3 will displace a clashing activity in Tier 2. Click on 'Edit' to change an activity's tier level.

Clashing activities in 'Orange' will mean they are not yet resolved as you have not put tiers in for the activities. However if the clashing activities are in 'Green' then they are 'Resolved', meaning the tiers have been used correctly.

Overview	PA Breakdown	Calendar	Clashing Activities			
<p>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.</p> <p>If two activities clash, the activity in the highest number tier will take precedence. e.g. an activity in Tier 3 will displace a clashing activity in Tier 2. Click on 'Edit' to change an activity's tier level.</p>						
Tier	Start	End	Activity	Hours	PAs	
clashing						
1	08:30	16:30	DCC Weekly on Mondays and Tuesdays Inpatient Core Ward Round Hospital Morning ward round followed by inpatient individual sessions/tests.	16	4	 
1	09:00	13:00	TRAV Weekly on Mondays PROSPECTIVE COVER Core Hospital Outpatient Clinic	4	0.813	 

Overview	PA Breakdown	Calendar	Clashing Activities			
<p>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.</p> <p>If two activities clash, the activity in the highest number tier will take precedence. e.g. an activity in Tier 3 will displace a clashing activity in Tier 2. Click on 'Edit' to change an activity's tier level.</p>						
Tier	Start	End	Activity	Hours	PAs	
resolved						
2	08:30	16:30	DCC Weekly on Mondays and Tuesdays Inpatient Core Ward Round Hospital Morning ward round followed by inpatient individual sessions/tests.	16	4	 
1	09:00	13:00	TRAV Weekly on Mondays PROSPECTIVE COVER Core Hospital Outpatient Clinic	0	0	 

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.

Signatories

John T Smith
 Tier: 1
 Job Plan Owner
 john@example.com


 Signed on: 01 Aug 18 at 11:17
Revoke

Laura Gordon
 Tier: 1
 Medical Manager
 laura@example.com

Signature requested 01 Aug 18 at 11:17

Send Reminder

Sophie Buijsen
 Tier: 1
 Chief Operating Officer
 doctor.sophie@sardjv.co.uk

Signature requested 01 Aug 18 at 11:17

Send Reminder

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!

Dr John T Smith

Job Plan Apr 2017 - Mar 2018 (complete)



Activity Summary

	Hours	PAs
TRAV	4	0.813
DCC	31.48	7.752
MS	1	0.25
SPA	4	1
ED	2	0.406
PRIV	2	0
UNI	0	0
TOTAL	44.48	10.221

Core APA ATC

Sign Off

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

Signatories

John T Smith
Tier: 1
Job Plan Owner
john@example.com

John T Smith
Signed on: 17 Nov 16 at 15:24

Laura Gordon
Tier: 1
Medical Manager
laura@example.com

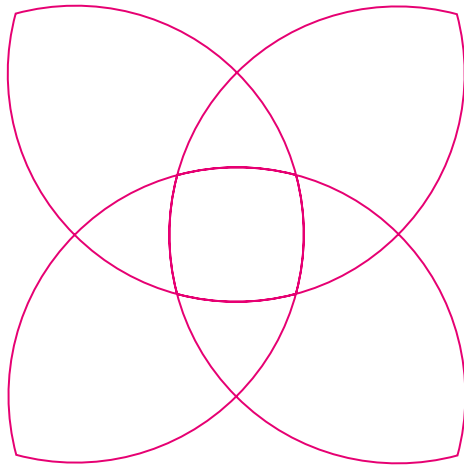
Laura Gordon
Signed on: 17 Nov 16 at 15:32

Sophie Buljzen
Tier: 1
Chief Operating Officer
doctor.sophie@sardjv.co.uk

Sophie Buljzen
Signed on: 17 Nov 16 at 15:32

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.



www.sardjv.co.uk