A little guide to e-JobPlan

for doctor users

CONTENTS

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BACKGROUND TO ZIRCADIAN

Zircadian Ltd was established in 2000 with the intention of providing NHS trusts with professional, medical HR software and excellent levels of support for users. Since its beginning Zircadian has expanded and diversified rapidly to become the leading provider of software and consultancy services for managing all hospital doctors in the NHS. The company's first core product, the e-Rota module of the Junior Doctor Portal, is used by over 130 NHS Trusts and five Strategic Health Authorities. More than 1,000 users log on to the portal daily. Zircadian's second core software system, e-JobPlan, has fast become the premier choice for online consultant job planning and has, to date, been adopted by almost 70 NHS Trusts. In addition to these core systems, Zircadian offers modules for electronic monitoring of junior doctors' hours of work, duty and activity rostering, leave management, locum management, and appraisal and revalidation. The company also provides consultancy services. Zircadian continues to be the only supplier of web-based doctor management software with helpdesk support included. In August 2011, Zircadian were welcomed into The Allocate Group who are the leading workforce optimisation software provider.

AN INTRODUCTION TO THIS GUIDE

We have put this guide together primarily as an accompaniment to our e-JobPlan training; you'll find essential information about entering your job plan, reports and viewing historic job plans. Towards the end of the guide you will find an appendix of useful material, including a summary of the On-call Supplements and some definitions used within e-JobPlan.

As with many online software applications, e-JobPlan is regularly updated with new modules and revisions; for this reason the guide is not designed to be a full software manual. A full manual can be located in the Support tab of the application.

The Consultant Portal support team are on-hand during normal office hours (9am-5.30pm) to support trust users with the Consultant Portal. We can be contacted by phone on 020 8946 8199, or via email at support@zircadian.com.

JOB PLAN STAGES

Below is a guide to the terminology used in the e-JobPlan system to describe the various stages of the job plan life cycle.

PUBLISH

Releasing a new job plan template to the doctor. This can either be a copy of a previous job plan, a copy of a colleague's job plan or a blank template. The 1st sign-off manager or Project Manager can publish a job plan either into the draft or discussion stage.

DRAFT

Optional stage as defined by the Trust. Only the doctor can view, amend and report on their job plan as required. The Trust cannot view or include it in reports. Some Trusts may place an automatic move to discussion so that after a specific number of days after the job plan has been published, it will move to discussion if the doctor hasn't already done so themselves.

DISCUSSION

View and edit rights for both the 1st sign-off manager and the doctor. Any amendments made in the discussion stage are recorded within the changes reports. Either party can request sign-off 1st level sign-off. The job plan is included in Trust reports.

1st SIGN-OFF

No longer editable. The party who received the request to sign-off must either approve it or move it back to discussion so further amendments can be made.

2nd / 3rd SIGN-OFF

Optional stages as defined by Trust. No longer editable. The 2nd or 3rd sign-off managers must either approve or move back to discussion for further amendments.

SIGNED OFF

Fully approved and locked down. No further changes are required until the next round of job planning.

MEDIATION / APPEAL

Optional stage. To be used where either party disagree at first or second sign-off stages. Allows process to be tracked and relevant documentation to be attached.

GETTING STARTED

LOGGING IN

1.1. To log in to e-JobPlan, open up your browser window and type in the following web address: **www.zircadian.com**. Towards the top left hand side of the screen, click **log in to your consultant portal**.

Figure 1: Logging into e-JobPlan

1.2. You should have recently received an email with your username and password. Enter these details into the appropriate fields, remembering that your password is case sensitive.

If you have logged in previously, it is likely that you will need to enter the password you chose upon your first login.

LOGGING IN FOR THE FIRST TIME

1.3. When you login for the first time you will be asked to confirm your own personal details held in the system. Any personal details already held in the system for you would have been passed to Zircadian by your Trust during the implementation phase. Make any changes as necessary, and then enter a new password (minimum of 6 characters including 1 numeric) and click **save**.

DASHBOARD

1.4. When you log in to e-JobPlan, the screen will provide summary information relating to your job plan – this is your personal dashboard.

To start entering your job plan, click the **start the job plan wizard** or **edit job plan** buttons on the right hand side. The job plan wizard will guide you through each step of the job plan entry form – each step is numbered across the top of your job plan.

JOB PLAN WIZARD STEPS

STEP 1: REQUIRED INFORMATION

2.1. This step allows you to specify some of the basic properties of your job plan. Once you have filled in all the required information, click **save & continue**.

STEP 2: PERSONAL OBJECTIVES

2.2. Objectives are an optional element of the system and your trust may or may not have decided to use them for this round of job planning. e-JobPlan allows for three levels of objective: trust, service and personal. The relevant blue links at the top of this step allow you to view the trust and service objectives. Your own personal objectives can be added at this stage.
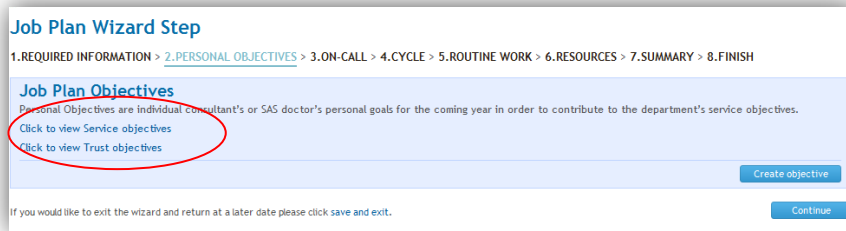
Figure 2: Personal objectives

2.3. In order to create your personal objectives you will need to click **create objective**; you will be presented with a free text box. You can also choose to link the objective to one of the service objectives. To do this, select an objective from the drop down list under 'service objective to link to'. Once you have entered the objective click **save**.

Once you have finished entering all of your objectives, click **save** and then again on the **continue** button.

Figure 3: Linking personal and service objectives

STEP 3: ON-CALL

2.4. The entry of your on-call details will depend on whether you are a consultant or SAS doctor – you will be provided with the appropriate screen for your role. Where permitted by your trust, consultants may have the option of entering their on-call work either directly in PAs (direct method), or using the on-call calculator (calculator method).
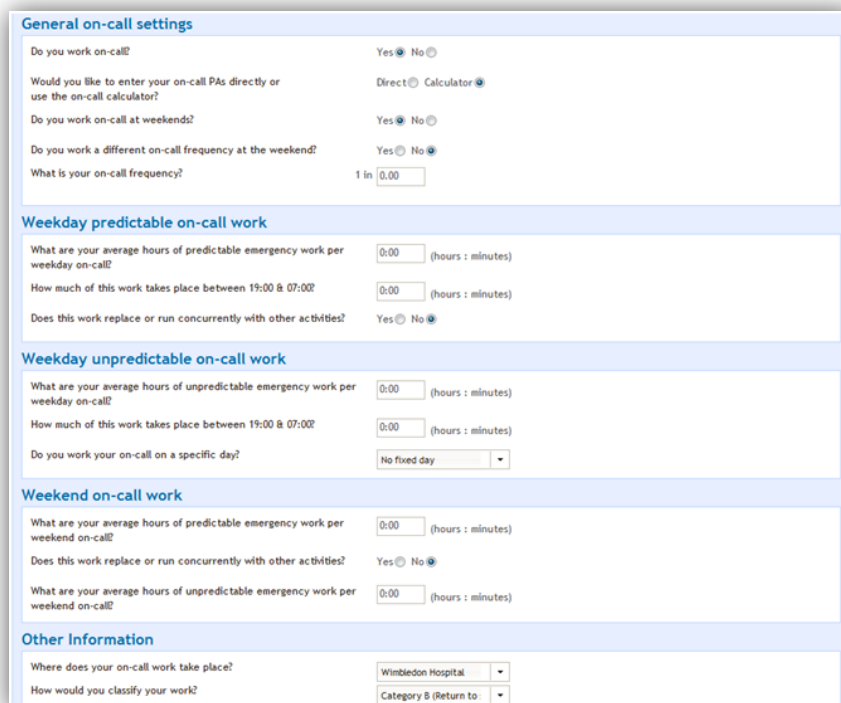
On-call entry for SAS doctors

2.5. If you are an SAS doctor, you will need to indicate the type of out-of-hour work you perform. If you have specified shift work, click **save & continue** and then record details of your shifts on the Routine Work step of the wizard. If you have selected no out-of-hours work simply click on **save & continue**. With either option, you can now proceed to step 4.

On-call entry for consultants (calculator method)

2.6. The calculator asks you the questions needed in order to ascertain your PAs arising from on-call work and also your on-call availability supplement.

You can set different frequencies of on-call work for midweek days and weekends. You can also specify how much of your predictable and unpredictable on-call work is carried out in premium time and whether any of the work runs concurrently with other scheduled activities (if you indicate that the work runs concurrently with other duties, it will not attract a PA value). The on-call calculations will include prospective cover.

Figure 5: Consultant entering on-call (calculator method)

On-call entry for consultants (direct method – optional)

2.7. To enter on-call work directly, select **direct** and then enter the PAs arising from your predictable and unpredictable on-call work. Click on the 'Save & Continue' button to proceed to the next step.
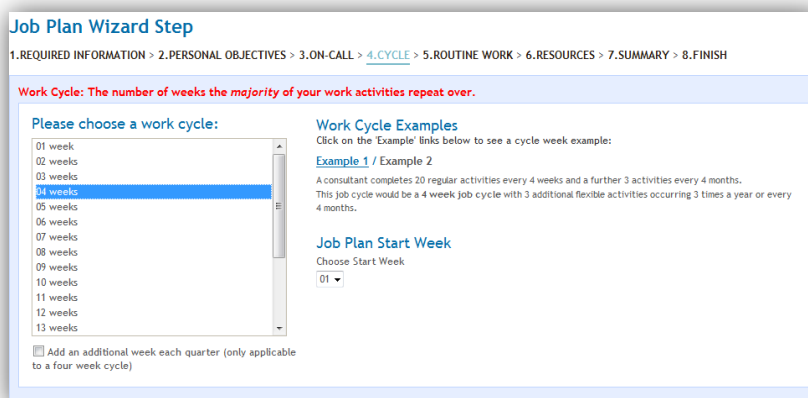

Figure 6: Consultant entering on-call (direct method)

STEP 4: CYCLE

2.8. On this step you will need to select the number of weeks over which the majority of fixed commitments on your job plan occur. The cycle does not have to fit every single activity on your timetable, just the majority of them. If there are occasional activities that fall outside of the job plan cycle, you will be able to enter these as flexible activities (see step 5: routine work, for more information).

The cycle is not the same as the frequency of your on calls (for example your on-call frequency could be 1:16, but your fixed commitments may be a 1:3 basis). Once you have specified your cycle, click **save & continue**.

Figure 7: Choosing a work cycle

STEP 5: ROUTINE WORK

2.9. The routine work tab allows you to input all of the activities that make up your job plan. To input an activity against a day and time, specify the following information in the 'add new activity' panel to the left of the screen:

Day – Select either a day of the week for timetabled work or 'no specified day' for a flexible activity. If you are adding a flexible activity, you will be asked to indicate whether the activity replaces or runs concurrently with another timetabled activity (if you select Yes, then no PA value will be allocated to the flexible activity).

Category – Select the category for your activity.

Activity – Specify the activity name (each list of activities has been defined by your Trust). If you are an SAS doctor, this is where you can select the 'shift on junior doctor rota' option if you wish to input details for your out of hour shift work.

Start time and end time – You will need to enter the start and end time for timetabled activities.

Duration time – You will need to enter a duration time for 'no-specified day' activities.

Premium time work – For flexible activities you will need to specify if any of the activity occurs in premium time.

How would you like to enter this activity? – Select from either: weekly timetabled (after which you will need to specify each week in your cycle when the activity takes place) OR annualised activities (where you can indicate how many of these activities occur throughout the year).
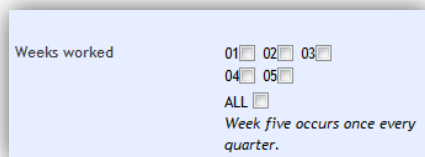

Figure 8: Weekly timetabled activities

Link objective - choose whether to link the activity with an objective. You can choose 'no linked objective' if you do not wish for the activity to be linked. Your trust may have chosen not to use objectives, in which case 'no linked objective' will be the only option.
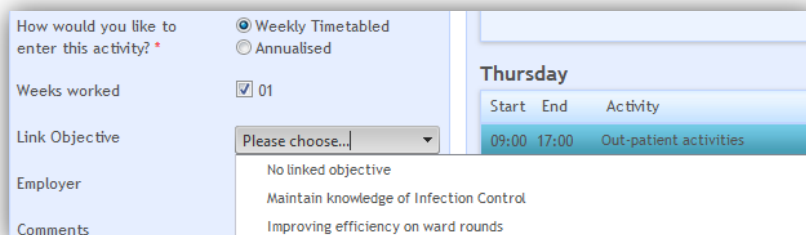

Figure 9: Linking activities to objectives

Once an activity is linked to an objective, it will appear on the job plan with a link icon. If you hover your mouse pointer over this icon, the objective name will appear.

Location – Where the activity takes place. The available list has been defined by your trust.

Employer – Choose between either your main or alternate employer (alternate employer is only available if you have specified one on the Required Information step of the wizard).

Comments – enter any additional comments about the activity.

Tick the 'remember settings for next activity' if the next activity you are going to enter is similar to the one you are just about to save. Click **Add**.

The activity will now be displayed against the day of the week for timetabled activities:

Figure 10: Weekly timetabled activity

Or under the no specified day section for flexible entries:

Figure 11: Annualised activity

To view any comments associated with the activity, hover your mouse-pointer over the icon. To delete the activity, click on the ✕ icon. To edit the activity, click on the icon. If you select this icon, the 'Edit activity' panel on the left will populate with the details of the activity that you wish to change. Make any necessary changes and then click on Save.

Additional PAs (APAs) – If your Trust has enabled you to include APAs in your job plan you will have an additional question in your 'Add New Activity' form:
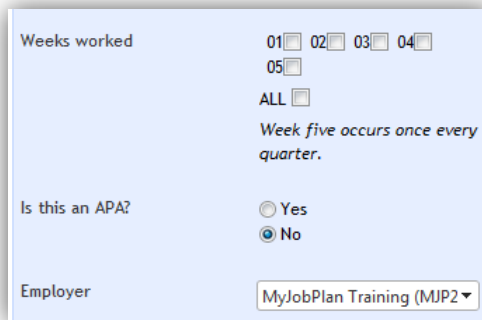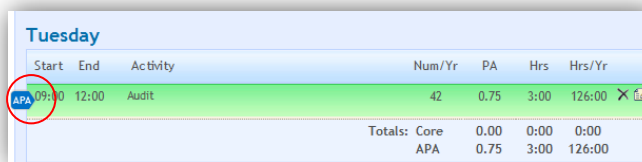
Figure 12: Choosing APA as an option

An APA activity is one that you deliver over and above your contracted hours. If you specify that an activity is an APA, it will appear in your timetable as shown below:

Figure 13: Identifying an APA

Predetermined Travel Time – If the Trust has enabled predetermined travel time in the system, you will have the option to specify that there is travel linked to an activity. You will be asked to select where you are travelling to and from, and the system will automatically add the travel time to your activity.
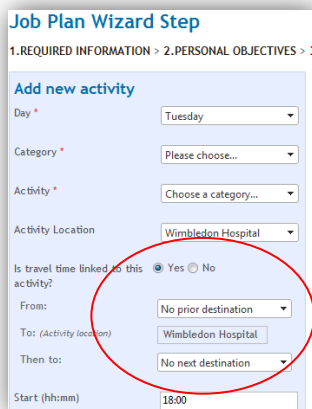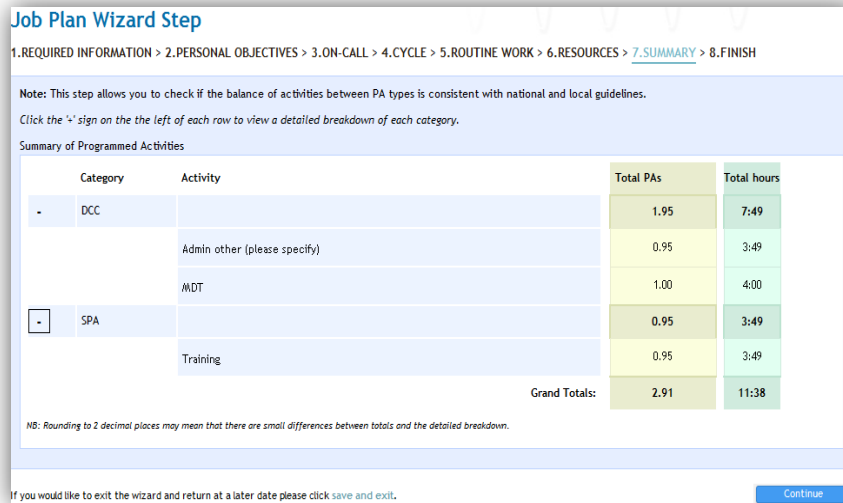

Figure 14: Inserting pre-determined travel time

STEP 6: RESOURCES

2.10.   This step of the wizard is optional, so you will only be able to see it if the project manager has enabled it. This step allows you to enter any resource requirements you may have under the headings of staff, equipment, clinical space and other.

STEP 7: SUMMARY

2.11.   The summary step groups together all of the work episodes recorded on your job plan by category and activity type. To view each category, click on the + symbol to the left of each header:

Figure 15: Job plan wizard summary

STEP 8: FINISH

2.12.   This is the final step of the wizard. There is an additional comments box where you can enter any further notes. From this screen, you can either select the **save in draft option**, which will leave your job plan in the draft stage or the **move to discussion** option, which will make your job plan visible to your manager. You can also **request sign-off** to enable your manager to approve the job plan.
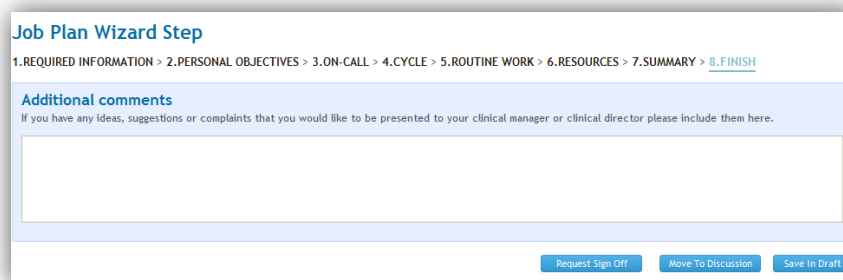

Figure 16: Final step of the wizard

REPORTS

Reports allow you to save, export and print data that appears on your job plan. Your dashboard contains three reports that you can generate.

JOB PLAN REPORT

3.1. This report allows you to print off a hard copy of all the information contained in your job plan. You also have the ability to save it as a Word document or an internet file. Select **printable job plan**.
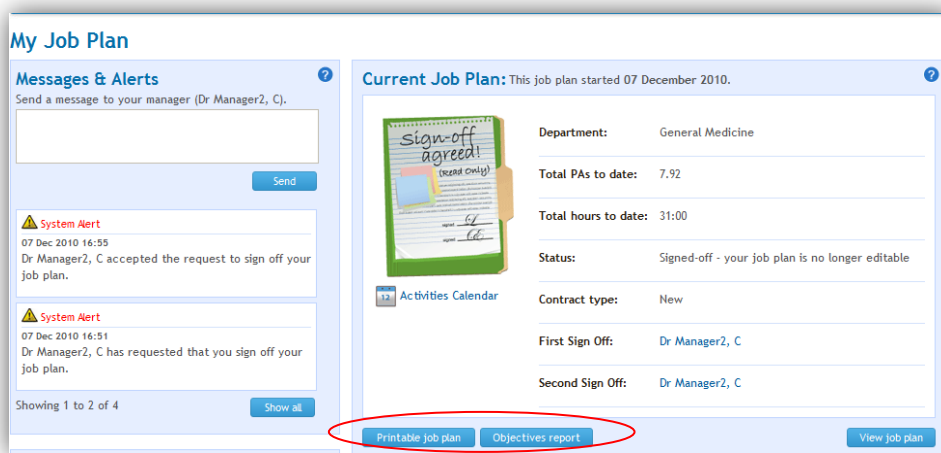
Figure 17: The job plan and objectives reports

OBJECTIVES REPORT

3.2. This report shows how the objectives and activities are being linked. The report also shows your PA contribution compared with the rest of your department. Select **objectives report**.

CHANGES REPORT

3.3. The changes report tracks on the left of the dashboard any edits made to your job plan whilst in the discussion stage. You can either see a report with changes for a particular day or you can select the 'original compared to current' option for a report on what is on the job plan now compared to what was originally submitted to discussion.

Figure 18: Changes Report

HISTORIC JOB PLANS

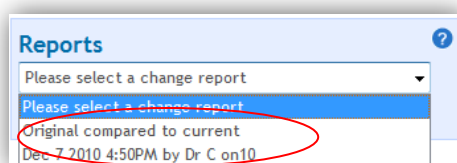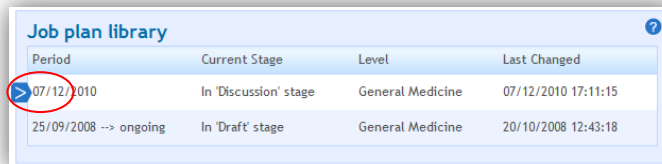4.1. If you wish to view a job plan from a previous round, you can locate the historic job plans in the bottom right hand corner of the dashboard within the job plan library. The job plan being displayed on the main screen will always be the job plan which is indicated by the blue marker shown below. If you wish to view another job plan, just click on the entry.

Figure 19: Job plan library

ADDITIONAL HELP

ON SCREEN

5.1. Each step of the wizard will display a **help** symbol. To view help, hover over the question mark on the right hand side of each screen.

If you hover over any of the questions with your mouse-pointer, the system will display additional pop-up help text.
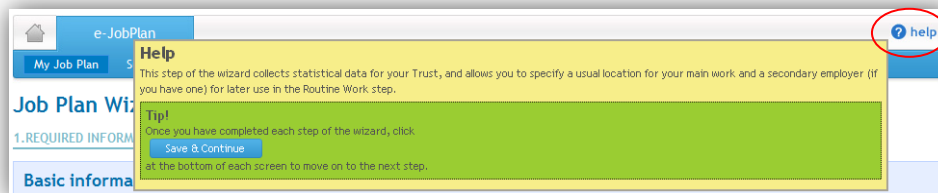
Figure 20: Additional on-screen help

FROM YOUR PROJECT MANAGER

5.2. Your trust will have a nominated job planning project manager who has the responsibility of administering the system. They should be your first port of call for queries related to logging in and managing your job plans. Your project manager can also resend your login details if required.

JOB PLANNING GUIDANCE

5.3. Your trust may have uploaded their own guidance document detailing their expectations for the content of your job plan. If available, this guidance can be found on your dashboard as a link to a PDF document.

DEFINITIONS

NORMAL AND PREMIUM TIME

Depending on how Premium Time has been defined by the Trust:

- 1 PA may equate to 4 hours of work

- 1 PA may equate to 3 hours of work

WEEKS IN ATTENDANCE

The number of weeks in attendance is the number of weeks a doctor is available to work (52 weeks minus leave entitlements). This can be customised by the Project Manager but 42 weeks is the norm (to account for 6 weeks of annual leave, 2 weeks of study leave and 10 bank holidays). Trusts that do not utilise 42 weeks in attendance have a range of 41-44 weeks in attendance.

EMERGENCY WORK

Direct clinical care includes emergency work carried out by consultants. This can be divided into predictable and unpredictable emergency work. The predictable and unpredictable emergency work will vary by specialty. On-call work that takes place during a period of scheduled Programmed Activity (that is not counted within the job as emergency work) will not count as emergency work. Travel to and from work for NHS emergencies will count as working time (*Consultant contract, Schedule 12, Paragraph 11*).

PREDICTABLE EMERGENCY WORK

Emergency work that takes place at regular and predictable times, often as a consequence of a period of on-call work (e.g. post-take ward rounds).

UNPREDICTABLE EMERGENCY WORK

This is work performed whilst on-call and associated directly with the consultant's on-call duties (except in so far as it takes place during a time for scheduled Programmed Activities), e.g. recall to hospital to operate on an emergency basis. On call pay for doctors consists of two parts:

- An availability supplement as per the national Terms and Conditions; which does not take account of prospective cover.

- Recognition of work done whilst on-call (in terms of PAs) which does recognise prospective cover.

ON-CALL AVAILABILITY SUPPLEMENT

If a consultant is required to participate in an on-call rota, he or she shall be paid a supplement in addition to their basic salary, in recognition of his or her availability to work during on-call periods. The availability supplement will be paid at the appropriate rate set out in Table 1 below.

The level of supplement will depend on both:

- The contribution of the consultant to the on-call rota, and
- The category of the consultant's on-call duties.

Category A: this applies where the consultant is typically required to return immediately to site when called or has to undertake interventions with a similar level of complexity to those that would normally be carried out on site, such as telemedicine or complex telephone consultations.

Category B: this applies where the consultant can typically respond by giving telephone advice and/or by returning to work later.

Frequency of Rota Commitment	Value of supplement as a percentage of full-time basic salary	
	Category A	Category B
High Frequency: 1 in 1 to 1 in 4	8.0%	3.0%
Medium Frequency: 1 in 5 to 1 in 8	5.0%	2.0%
Low Frequency: 1 in 9 or less frequent	3.0%	1.0%

Figure 21: On-call supplements and categories

If a doctor works two different on-call frequencies (one for midweek and another for weekends), the highest frequency is used to calculate the on-call supplement