

# **e-JobPlan Consultant User Manual**

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# Table of Contents

<b>1.</b>	<b>LOGGING ON .....</b>	<b>3</b>
1.1.	LOGGING ON WITH MULTIPLE ROLES .....	4
1.2.	NEED HELP LOGGING ON?.....	5
1.3.	FORGOTTEN LOGIN DETAILS .....	6
<b>2.</b>	<b>INPUTTING YOUR JOB PLAN .....</b>	<b>7</b>
2.1.	JOB PLAN WIZARD .....	7
<b>3.</b>	<b>DISCUSSION STAGE .....</b>	<b>24</b>
3.1.	EDITING YOUR JOB PLAN .....	24
3.2.	MEDIATION & APPEAL.....	26
<b>4.</b>	<b>SIGN OFF PROCESS.....</b>	<b>27</b>
4.1.	REQUESTING SIGN OFF .....	27
4.2.	PROVISIONAL (FIRST) SIGN OFF.....	29
4.3.	FINAL (SECOND OR THIRD) SIGN OFF .....	30
<b>5.</b>	<b>REPORTS .....</b>	<b>31</b>
5.1.	JOB PLAN REPORT .....	31
5.2.	OBJECTIVES REPORT .....	32
5.3.	CHANGES REPORT .....	34
<b>6.</b>	<b>OLD JOB PLANS .....</b>	<b>35</b>
<b>7.</b>	<b>ACTIVITIES CALENDAR.....</b>	<b>36</b>
<b>8.</b>	<b>SENDING FEEDBACK .....</b>	<b>39</b>
<b>9.</b>	<b>MY DETAILS.....</b>	<b>41</b>
<b>10.</b>	<b>PREFERENCES .....</b>	<b>42</b>
<b>11.</b>	<b>SUPPORT .....</b>	<b>43</b>
<b>12.</b>	<b>LOGGING OUT .....</b>	<b>45</b>

# 1. Logging On

To log on to e-JobPlan, open up an Internet Explorer window and type in the following Internet address: [www.zircadian.com](http://www.zircadian.com)

Towards the bottom right hand side of the screen, click on the 'Log in to your Consultant Portal' button.

For support and enquiries call us on  
020 8946 8199

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The Royal Bournemouth and Christchurch Hospitals NHS Foundation Trust

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> Log in to your Consultant Portal  
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Alternatively, go to [www.consultantdrportal.com](http://www.consultantdrportal.com). This will take you to the screen below, where you can enter your login details. To log on, you will need the Username and Password, which you should have received by email. Enter these details into the 'Log in details' field and then click on the 'Login' button.

You will be asked to change your password to something you can remember more easily in future. Type in your new password in the 'New password' and 'Re-enter new password' fields (the new password must be identical in these two fields). The new password must be at least 6 characters long and include at least one number. Click on 'Save'.

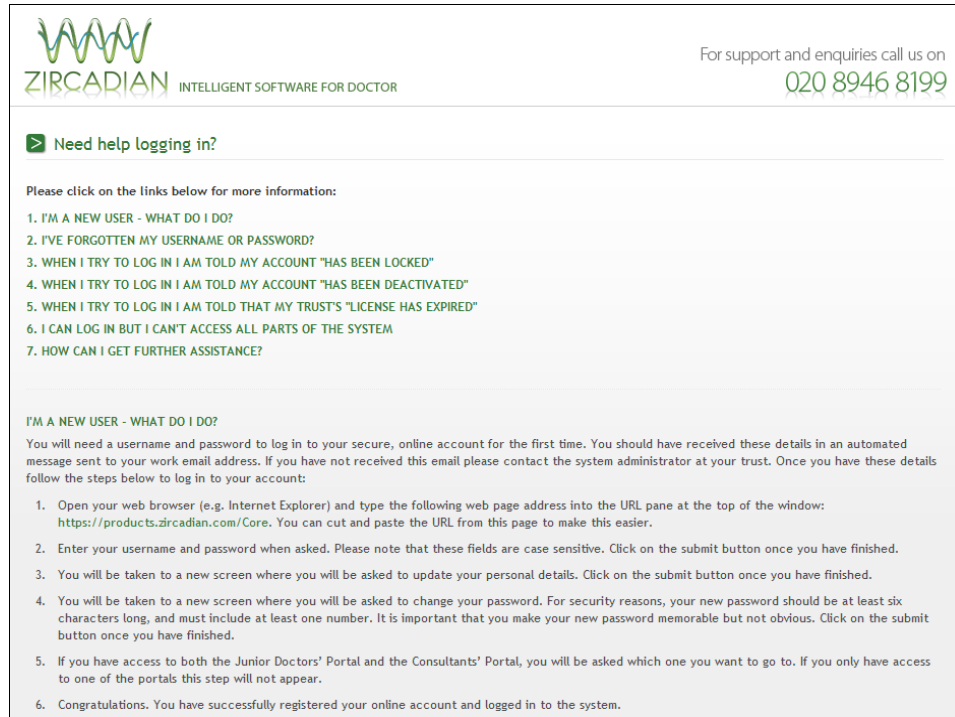
This will be your password from now on.

### 1.1. Logging on with multiple roles

If you have been assigned a Manager Role as well as Consultant rights within the system, you will be brought to the Manager Dashboard. Please refer to the Manager User Manual for more information about accessing your own job plan.

## 1.2. Need Help Logging on?

If you are having difficulties logging in, to the right hand side you now have an area asking if you 'Need help logging in?'. If you 'click here', it will bring you to another page where it will give you different scenarios on why you are having difficulty logging in. There is also an area for further assistance if the user still has queries after reading this information



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For support and enquiries call us on **020 8946 8199**

**Need help logging in?**

Please click on the links below for more information:

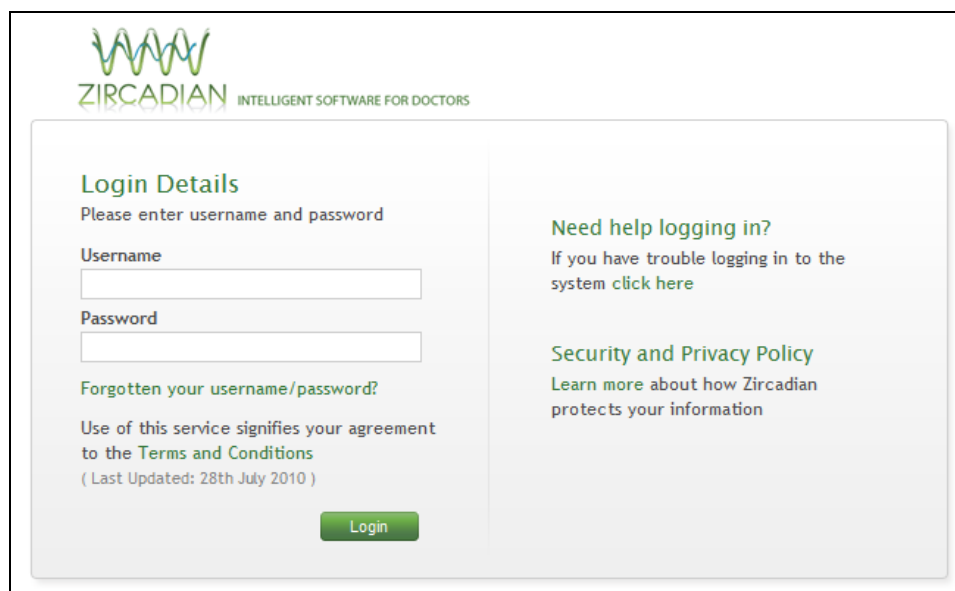
1. I'M A NEW USER - WHAT DO I DO?
2. I'VE FORGOTTEN MY USERNAME OR PASSWORD?
3. WHEN I TRY TO LOG IN I AM TOLD MY ACCOUNT "HAS BEEN LOCKED"
4. WHEN I TRY TO LOG IN I AM TOLD MY ACCOUNT "HAS BEEN DEACTIVATED"
5. WHEN I TRY TO LOG IN I AM TOLD THAT MY TRUST'S "LICENSE HAS EXPIRED"
6. I CAN LOG IN BUT I CAN'T ACCESS ALL PARTS OF THE SYSTEM
7. HOW CAN I GET FURTHER ASSISTANCE?

**I'M A NEW USER - WHAT DO I DO?**

You will need a username and password to log in to your secure, online account for the first time. You should have received these details in an automated message sent to your work email address. If you have not received this email please contact the system administrator at your trust. Once you have these details follow the steps below to log in to your account:

1. Open your web browser (e.g. Internet Explorer) and type the following web page address into the URL pane at the top of the window: <https://products.zircadian.com/Core>. You can cut and paste the URL from this page to make this easier.
2. Enter your username and password when asked. Please note that these fields are case sensitive. Click on the submit button once you have finished.
3. You will be taken to a new screen where you will be asked to update your personal details. Click on the submit button once you have finished.
4. You will be taken to a new screen where you will be asked to change your password. For security reasons, your new password should be at least six characters long, and must include at least one number. It is important that you make your new password memorable but not obvious. Click on the submit button once you have finished.
5. If you have access to both the Junior Doctors' Portal and the Consultants' Portal, you will be asked which one you want to go to. If you only have access to one of the portals this step will not appear.
6. Congratulations. You have successfully registered your online account and logged in to the system.

There is an area on Security and Privacy Policy, if you click on 'Learn More', at the login screen it will give you information about how your data is protected by Zircadian.



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**Login Details**  
Please enter username and password

Username

Password

**Forgotten your username/password?**

Use of this service signifies your agreement to the [Terms and Conditions](#)  
( Last Updated: 28th July 2010 )

**Login**

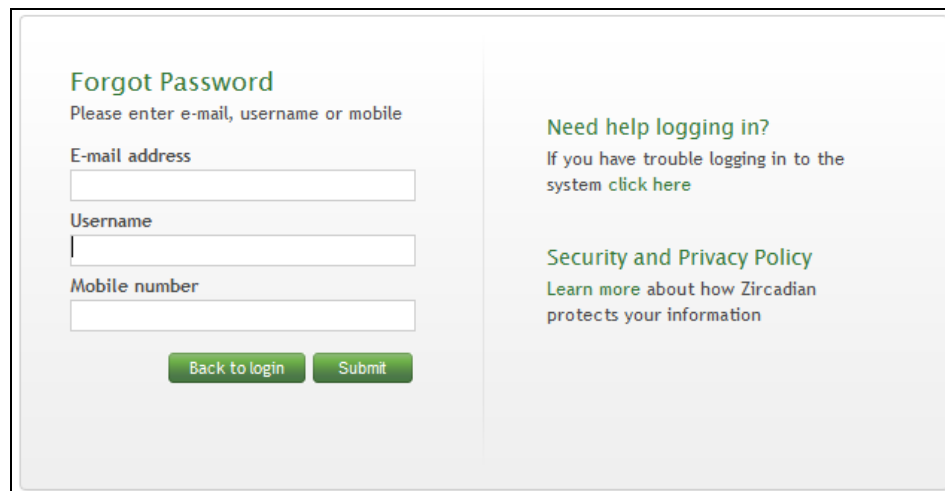
**Need help logging in?**  
If you have trouble logging in to the system [click here](#)

**Security and Privacy Policy**  
[Learn more](#) about how Zircadian protects your information

### 1.3. Forgotten Login details

If you have not received the email with your login details or if you have forgotten what your login details are, then you can request them again by emailing [support@zircadian.com](mailto:support@zircadian.com) or alternatively you can click on the 'forgot your username and password' link under the LOGIN button.

If you select this option, you will be asked to enter your e-mail address, username OR mobile phone number to verify your identity (the details you enter must match those saved in your e-JobPlan account). Please enter one of these options and then click on 'Submit'.



**Forgot Password**  
Please enter e-mail, username or mobile

E-mail address

Username

Mobile number

[Back to login](#) [Submit](#)

**Need help logging in?**  
If you have trouble logging in to the system [click here](#)

**Security and Privacy Policy**  
[Learn more about how Zircadian protects your information](#)

You will now receive a new email with your login details.

## 2. Inputting your job plan

When you log on to e-JobPlan, you will be taken to the e-JobPlan screen. This screen will provide summary information relating to your job plan and will also track its progress through the job planning stages:

Your job plan will either be in the Draft or Discussion stage depending on which of these options has been specified by the Project Manager at your Trust.

If your job plan is in the Draft stage, it will only be visible by you until you manually move it to the Discussion stage.

If your job plan is already in the Discussion stage, then the details contained within it are also visible to your Manager(s) and are also editable by them.

If your Trust has uploaded a guidance document to assist you with your job planning, you will be able to see this in the POLICIES & GUIDELINES section on the main screen. Simply click on the link and the document will open up in a separate window:

To start entering your job plan, click on the 'Start the Job Plan Wizard' button.

### 2.1. Job Plan Wizard

The job plan wizard will guide you through each step of the job plan entry form.

You can exit the wizard at any point by clicking on the 'save and exit' option at the bottom of each screen. The system will save your data and take you back to the last step you were working on next time you log in:

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:

The screenshot shows the 'Job Plan Wizard' interface. A yellow 'Help' pop-up window is overlaid on the form. The pop-up text reads: 'This step of the wizard collects statistical data for your Trust, and allows you to specify a usual location for your main work and a secondary employer (if you have one) for later use in the Routine Work step.' Below this, a green 'Tip!' box says: 'Once you have completed each step of the wizard, click Save & Continue at the bottom of each screen to move on to the next step.' The background form is titled 'Basic information' and contains fields for: 'Please select the date this job plan will start:' (28 January 2010), 'Have you signed up to the new contract?' (Yes/No), 'Where is your usual place of work?' (Wimbledon Hospital), 'Do you work full-time or part-time?' (Full-time/Part-time), and 'Do you have a second employer?' (Yes/No). A 'Save & Continue' button is at the bottom right.

If you hover over any of the questions with your mouse-pointer, the system will also display additional pop-up help text to explain in more detail the information you are required to provide for that field:

The screenshot shows the 'Job Plan Wizard Step' interface. A yellow pop-up help text is displayed over the 'Have you signed up to the new contract?' question. The pop-up text reads: 'Select Yes if you have signed up to the 2003 Doctor Contract.' The background form is titled 'Basic information' and contains the same fields as the previous screenshot. A breadcrumb trail at the top reads: '1.REQUIRED INFORMATION > 2.PERSONAL OBJECTIVES > 3.ON-CALL > 4.CYCLE > 5.ROUTINE WORK > 6.RESOURCE > 7.SUMMARY > 8.FINISH'. A 'Save & Continue' button is at the bottom right.

If you find that some or the entire job plan details have already been filled in, this is because your Manager has either issued you with last year's job plan or has prepared a template for you to use as a starting point. Please review the details and make any changes as necessary.

If none of the fields have been completed, this is because your Manager has issued you with a blank template to fill in.

### 2.1.1. Required Information

Specify some of the basic properties of your job plan:



Once you have filled in all the required information, click on the 'Save & Continue' button.

### 2.1.2. Personal Objectives

This section allows you to record your personal objectives.

**N.B This step is optional so it may not be visible to you if your Project Manager has not included objectives in the Trust Settings.**

To review any of the Trust objectives set by either the Project Manager, click on the 'click to view Trust objectives' or to review any of the service objectives set by either the Project Manager or your Clinical Manager, click on the 'click to view Service objectives' link beneath the 'Job Plan Objectives' header.

In order to create your personal objectives you will need to click 'create objective'.

Here you will be able to enter the Objective Title and Objective Content.

The Objective Title has a maximum character limit of 70, and the Objective Content has a maximum character limit of 8000.

You can link the objective to one of the department objectives. To do this, select an objective from the drop down list under ‘service objective to link to’.

The screenshot shows the 'Job Plan Wizard Step' interface. At the top, there is a breadcrumb trail: 1.REQUIRED INFORMATION > 2.PERSONAL OBJECTIVES > 3.ON-CALL > 4.CYCLE > 5.ROUTINE WORK > 6.RESOURCES > 7.SUMMARY > 8.FINISH. Below this is the 'Job Plan Objectives' section with a description and links to view service and trust objectives. A 'Create objective' button is visible. The main form area is titled 'Objective 1' and contains two text input fields: 'Edit objective title' (with 'Objective 1' entered) and 'Edit objective content' (with 'Example objective content' entered). To the right of the title field is a dropdown menu labeled 'Service objective to link to:'. This dropdown menu is open, showing three options: 'None', 'None', and 'Department Objective 1'. The 'Department Objective 1' option is highlighted with a red circle. At the bottom right of the form are 'Save' and 'Cancel' buttons.

Once you have entered the objective click ‘save’, or ‘cancel’ if you choose not to save the objective.

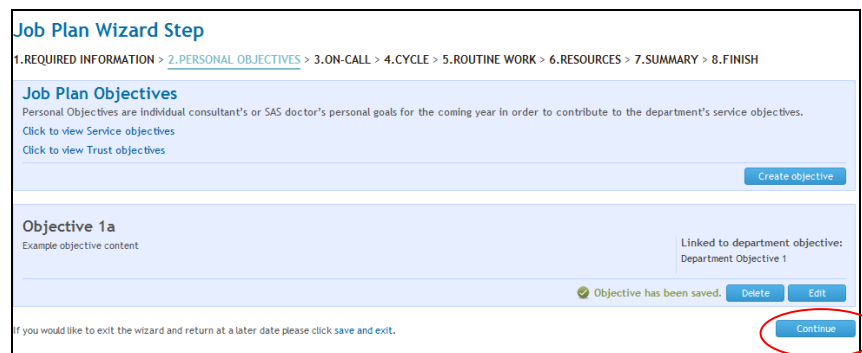
Once you have clicked ‘save’, and you then decide you want to remove the objective, click ‘delete’.

This screenshot shows the 'Job Plan Wizard Step' after the objective has been saved. The breadcrumb trail is the same. The 'Job Plan Objectives' section is present. The main form area for 'Objective 1' now shows 'Example objective content' in the content field. On the right side, it says 'Linked to department objective: Department Objective 1'. Below this, there is a green checkmark icon and the text 'Objective has been saved'. To the right of this text are two buttons: 'Delete' and 'Edit', both of which are circled in red. At the bottom right, there is a 'Continue' button. A small note at the bottom left says 'If you would like to exit the wizard and return at a later date please click save and exit.'

Alternatively, if you want to amend the objective detail, click ‘edit. Here you will be able to modify any of the information entered into either the objective title or content fields. You can also amend which service objective it is linked to.

This screenshot is identical to the previous one, showing the 'Job Plan Wizard Step' with the 'Delete' and 'Edit' buttons circled in red. It shows the 'Objective 1' form with the 'Service objective to link to' dropdown menu open, displaying 'Department Objective 1' as the selected option.

Once you have finished entering your objectives, click 'save' and then on the 'Continue' button.

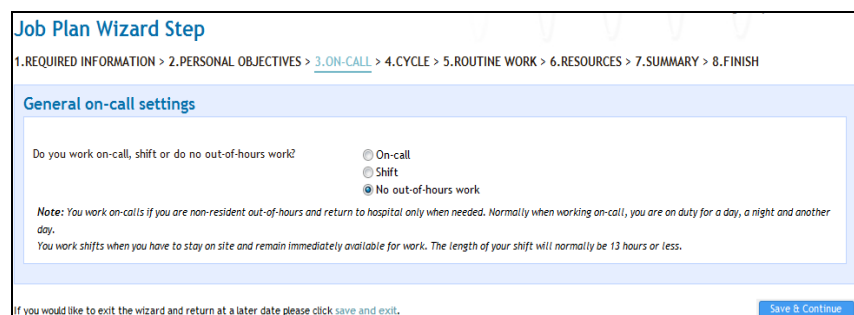


### 2.1.3. On Call

This step will allow you to specify your on-call commitments.

#### On Call entry for SAS Doctors

If you are an SAS doctor, you will need to indicate the type of out-of-hour work you carry out. This can be either On-call (these are non-resident overnight on-call duties), Shift work (these are usually resident 10-14 hour shifts) or you can indicate that you do not carry out any out-of-hours work:



If you have specified On-Call work, then please refer to the next paragraph entitled **Entering On-call work** for instructions on how to complete the next section.

If you have specified Shift work then you can click the 'Save & Continue' button and will need to 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'.

#### Entering On-call work

You may be required to enter on-call work as 'Calculated' in which case you will need to enter the average number of hours spent on predictable and unpredictable emergency work for weekday and weekend work and the system will calculate the PA values accordingly.

Alternatively, if your Project Manager has enabled the Trust Setting that allows doctors to enter on-call work directly, you may have the choice to enter either the average number of hours for on-call OR the direct PAs for predictable and unpredictable on-call work.

**On Call entry for Consultants- Calculated**

You can set different frequencies of on-call work for midweek days and weekends. If you do this, the on-call availability supplement will be determined by the highest frequency.

You will also need to specify how much predictable and unpredictable work you carry out during each on-call session. You can specify how much of this work is carried out in premium time (anything outside of 7am-7pm Monday to Friday) 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).

Under the PA count section, the system will automatically calculate the PAs associated with your on-call work. If your Project Manager has set the expected number of weeks in attendance to anything less than 52 weeks, the calculation will include prospective cover:

### Job Plan Wizard Step

1. REQUIRED INFORMATION > 2. PERSONAL OBJECTIVES > 3. ON-CALL > 4. CYCLE > 5. ROUTINE WORK > 6. RESOURCES > 7. SUMMARY > 8. FINISH

#### General on-call settings

Do you work on-call? Yes  No

Would you like to enter your on-call PAs directly or use the on-call calculator? Direct  Calculator

Do you work on-call at weekends? Yes  No

Do you work a different on-call frequency at the weekend? Yes  No

What is your on-call frequency? 1 in

#### Weekday predictable on-call work

What are your average hours of predictable emergency work per weekday on-call?  (hours : minutes)

How much of this work takes place between 19:00 & 07:00?  (hours : minutes)

Does this work replace or run concurrently with other activities? Yes  No

#### Weekday unpredictable on-call work

What are your average hours of unpredictable emergency work per weekday on-call?  (hours : minutes)

How much of this work takes place between 19:00 & 07:00?  (hours : minutes)

Do you work your on-call on a specific day? No fixed day

#### Weekend on-call work

What are your average hours of predictable emergency work per weekend on-call?  (hours : minutes)

Does this work replace or run concurrently with other activities? Yes  No

What are your average hours of unpredictable emergency work per weekend on-call?  (hours : minutes)

#### Other Information

Where does your on-call work take place? Wimbledon Hospital

How would you classify your work? Category B (Return to)

#### PA Count

The number of PAs arising from your predictable on-call work is: 0.00

The number of PAs arising from your unpredictable on-call work is: 0.00

Your on-call availability supplement is: 0%

Expected number of weeks in attendance: 42

Number of weekdays for on-call purposes: 5 (Monday to Friday)

Comments:

If you would like to exit the wizard and return at a later date please click save and exit. Save & Continue

### On Call entry for Consultants- 'Direct'

To enter on-call work directly, select 'Direct' and then enter the PAs arising from your predictable and unpredictable on-call work.

**Job Plan Wizard Step**

1. REQUIRED INFORMATION > 2. PERSONAL OBJECTIVES > 3. ON-CALL > 4. CYCLE > 5. ROUTINE WORK > 6. RESOURCES > 7. SUMMARY > 8. FINISH

**General on-call settings**

Do you work on-call? Yes  No

Would you like to enter your on-call PAs directly or use the on-call calculator? Direct  Calculator

Enter the number of PAs arising from your predictable on-call work:

Enter the number of PAs arising from your unpredictable on-call work:

What is your on-call frequency? 1 in

**Other Information**

Where does your on-call work take place?

How would you classify your work?

**PA Summary**

The number of PAs arising from your predictable on-call work is: 1.00

The number of PAs arising from your unpredictable on-call work is: 1.00

Your on-call availability supplement is: 2%

Expected number of weeks in attendance: 42

Number of weekdays for on-call purposes: 5 (Monday to Friday)

Comments:

If you would like to exit the wizard and return at a later date please click save and exit.

Click on the 'Save & Continue' button to proceed to the next step.

#### 2.1.4. Cycle

On this step you will need to select the number of weeks over which the majority of fixed commitments on your job plan cycle 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 Routine Work step for more information).**

The cycle is also 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 cycle on a 1:3 basis).

If you want to specify a cycle which includes a 5<sup>th</sup> week every quarter, select the four weeks option and tick the 'Add an additional week each quarter' tick-box under the Work Cycle selection window.

**Job Plan Wizard Step**

1.REQUIRED INFORMATION > 2.PERSONAL OBJECTIVES > 3.ON-CALL > **4.CYCLE** > 5.ROUTINE WORK > 6.RESOURCE > 7.SUMMARY > 8.FINISH

**Work Cycle: The number of weeks the majority of your work activities repeat over.**

**Example 1**  
A consultant completes 20 regular activities every 4 weeks and a further 3 activities every 4 months. This job cycle would be a 4 week job cycle with 3 additional flexible activities occurring 3 times a year or every 4 months.

**Example 2**  
A consultant completes 25 regular activities every 6 weeks and also attends a conference twice a year as well as chairing an external NHS committee meeting every quarter (once every three months). This job cycle would be a 6 week job cycle with one additional flexible activity occurring twice a year and another flexible activity occurring 4 times a year or once every 3 months.

**Please choose a work cycle:**

- 01 week
- 02 weeks
- 03 weeks
- 04 weeks
- 05 weeks
- 06 weeks
- 07 weeks
- 08 weeks
- 09 weeks
- 10 weeks
- 11 weeks
- 12 weeks
- 13 weeks

Add an additional week each quarter (only applicable to a four week cycle)

If you would like to exit the wizard and return at a later date please click **save and exit**.

**Save & Continue**

Once you have specified your cycle, click on the 'Save & Continue' button.

### 2.1.5. Routine Work

The Routine Work tab allows you to input all of the activities that make up your job plan. You can input these activities as either fixed entries against a specific day and time or you can input them as flexible entries (these are work episodes which may fall outside of your regular cycle, for example a conference you attend once a year or a monthly meeting).

The screen is made up of the 'Add new activity' panel on the left-hand side and the actual timetable which is split into days of the week.

Flexible entries are displayed beneath the 'No specified day' header and a summary of the on-call PAs will also be displayed at the bottom of the screen:

To input an activity against a day and time, specify the following information in the '**Add new activity**' panel:

**Day** – Select either a day of the week for timetabled work or 'No specified day' if you wish to enter 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):

**Add new activity**

Day \*

Category \*

Activity \*

Activity Location

Duration (hh:mm)

This activity:

- Is additional to work already timetabled in Job plan
- Runs concurrently with work already timetabled in job plan
- Replaces work already timetabled in job plan

How much of this event occurs outside of 7am-7pm Monday to Friday? (hh:mm)

Annual number of delivered activities? \*

Employer

Comments

Remember settings for next activity

**Category** – Select the category;

**Activity** – Specify the actual 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 much of this event occurs outside of 7am-7pm Monday to Friday? (hh:mm)

**How would you like to enter this activity?** – Select from either: Weekly Timetabled - specify the weeks in your cycle when the activity takes place:

Weeks worked

01  02  03

04  05

ALL

*Week five occurs once every quarter.*



Annualised activities - indicate how many activities of that type are delivered in a year (only the annualised option will be available for flexible activities):

Annual number of delivered activities? *	<input type="text" value="1.00"/>
--	-----------------------------------

**Location** – Where the activity takes place

**Employer** – Choose between the 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

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:

Tuesday						
Start	End	Activity	Num/Yr	PA	Hrs	Hrs/Yr
09:00	10:00	Continuous professional development (wks 1-2)	28	0.17	0:40	18:40
Totals: Core				0.17	0:40	18:40
APA				0.00	0:00	0:00


Or under the No Specified Day section (underneath Sunday) for flexible entries:







No specified day						
Norm	Prem	Activity	Num/Yr	PA	Hrs	Hrs/Yr
2:00	0:00	Research	6	0.07	0:17	1:42
Totals: Core				0.07	0:17	1:42
APA				0.00	0:00	0:00

Even if entered as timetabled work, the system will always calculate the number of activities delivered per year.


Annualised and flexible activities are calculated over the number of expected weeks in attendance. This is set by your Project Manager and can be seen in the PA breakdown section underneath the Add New Activity panel:

PA breakdown	
Total PAs to date:	2.91
Total Hours to date:	11:38
Expected no. of weeks in attendance:	44

To view any comments associated with the activity, hover your mouse-pointer over the  icon.

Monday							
Start	End	Activity	Num/Yr	PA	Hrs	Hrs/Yr	
09:00	12:00	 Administrative work directly related to clinical care	42	0.75	3:00	126:00	 
12:00	14:00	 Clinical management	42	0.50	2:00	84:00	 
<div style="border: 1px solid black; padding: 5px;"> <b>Comments:</b>            Example Comment         </div>			Totals: Core 1.25 5:00 210:00 APA 0.00 0:00 0:00				

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 (APA's)** – If you Trust has requested we include APAs in your job plan. You will have an additional question in your 'Add New Activity' form:

### Add new activity

Day \*

Category \*

Activity \*

Activity Location

Is travel time linked to this activity?  Yes  No

From:  (30)

To: (Activity location)  (30)

Then to:

Start (hh:mm)

End (hh:mm)

Premium Time

How would you like to enter this activity? \*  Weekly Timetabled  Annualised

Weeks worked  01  02  03  04  05  ALL

*Week five occurs once every quarter.*

Is this an APA?  Yes  No

Employer

Comments

APAs allow you to record activities 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:

<p>Activity Location <input type="text" value="Wimbledon Hospital"/></p> <p>Is travel time linked to this activity? <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>From: <input type="text" value="No journeys available"/></p> <p>To: (Activity location) <input type="text" value="Wimbledon Hospital"/></p> <p>Then to: <input type="text" value="No journeys available"/></p> <p>Start (hh:mm) <input type="text" value="9:00"/></p> <p>End (hh:mm) <input type="text" value="10:00"/></p> <p>Premium Time <input type="text" value="0:00"/></p> <p>How would you like to enter this activity? * <input checked="" type="radio"/> Weekly Timetabled <input type="radio"/> Annualised</p> <p>Weeks worked <input checked="" type="checkbox"/> 01 <input type="checkbox"/> 02 <input type="checkbox"/> 03 <input type="checkbox"/> 04 <input type="checkbox"/> 05 <input type="checkbox"/> ALL <input type="checkbox"/></p> <p>Is this an APA? <input type="radio"/> Yes <input checked="" type="radio"/> No</p>	<p><b>Tuesday</b></p> <table border="1"> <thead> <tr> <th>Start</th> <th>End</th> <th>Activity</th> <th>Num/Yr</th> <th>PA</th> <th>Hrs</th> <th>Hrs/Yr</th> </tr> </thead> <tbody> <tr> <td>09:00</td> <td>10:00</td> <td>Audit</td> <td>42</td> <td>0.75</td> <td>3:00</td> <td>126:00</td> </tr> <tr> <td colspan="3">Totals: Core</td> <td>0.00</td> <td>0:00</td> <td>0:00</td> <td></td> </tr> <tr> <td colspan="3">Totals: APA</td> <td>0.75</td> <td>3:00</td> <td>126:00</td> <td></td> </tr> </tbody> </table> <p><b>Wednesday</b></p> <table border="1"> <thead> <tr> <th>Start</th> <th>End</th> <th>Activity</th> <th>Num/Yr</th> <th>PA</th> <th>Hrs</th> <th>Hrs/Yr</th> </tr> </thead> <tbody> <tr> <td>13:00</td> <td>19:00</td> <td>Audit</td> <td>42</td> <td>1.50</td> <td>6:00</td> <td>252:00</td> </tr> <tr> <td colspan="3">Totals: Core</td> <td>1.50</td> <td>6:00</td> <td>252:00</td> <td></td> </tr> <tr> <td colspan="3">Totals: APA</td> <td>0.00</td> <td>0:00</td> <td>0:00</td> <td></td> </tr> </tbody> </table> <p><b>Thursday</b></p> <p>You have not added any activities for this day.</p> <p><b>Friday</b></p> <p>You have not added any activities for this day.</p>	Start	End	Activity	Num/Yr	PA	Hrs	Hrs/Yr	09:00	10:00	Audit	42	0.75	3:00	126:00	Totals: Core			0.00	0:00	0:00		Totals: APA			0.75	3:00	126:00		Start	End	Activity	Num/Yr	PA	Hrs	Hrs/Yr	13:00	19:00	Audit	42	1.50	6:00	252:00	Totals: Core			1.50	6:00	252:00		Totals: APA			0.00	0:00	0:00	
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Totals: Core			1.50	6:00	252:00																																																				
Totals: APA			0.00	0:00	0:00																																																				

**Predetermined Travel Time** – If the Trust has set Predetermined Travel Time in the system, you will have the option to specify that there is travel linked to an activity.

**Job Plan Wizard Step**  
 1. REQUIRED INFORMATION > 2. PERSONAL OBJECTIVES > 3. ON-CALL > 4. CYCLE > 5. ROUTINE WORK > 6. RESOURCES > 7. SUMMARY > 8. FINISH

**Add new activity**

Day \*

Category \*

Activity \*

Activity Location

Is travel time linked to this activity?  Yes  No

From:

To: (Activity location)

Then to:

Start (hh:mm)

End (hh:mm)

Premium Time

How would you like to enter this activity? \*  Weekly Timetabled  Annualised

Weeks worked

Monday					
Start	End	Activity	Num/Yr	PA	Hrs Hrs/Yr
09:00	12:00	Administrative work directly related to clinical care	42	0.75	3:00 126:00
12:00	14:00	Clinical management	42	0.50	2:00 84:00
14:00	18:00	Clinical diagnostic work	42	1.00	4:00 168:00
Totals: Core			2.25	9:00	378:00
APA			0.00	0:00	0:00

Tuesday					
Start	End	Activity	Num/Yr	PA	Hrs Hrs/Yr
09:00	11:00	Local clinical governance	42	0.50	2:00 84:00
11:00	12:00	Caldicott guardian	42	0.25	1:00 42:00
12:00	14:00	Administrative work directly related to clinical care	42	0.50	2:00 84:00
14:00	15:00	Clinical diagnostic work	42	0.25	1:00 42:00
15:00	17:00	Appraisal	42	0.50	2:00 84:00
17:00	18:00	Other patient treatment	42	0.25	1:00 42:00
Totals: Core			2.25	9:00	378:00
APA			0.00	0:00	0:00

Wednesday					
Start	End	Activity	Num/Yr	PA	Hrs Hrs/Yr

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 as shown below.

Is travel time linked to this activity?  Yes  No

From:

To: (Activity location)

Then to:

Start (hh:mm)

End (hh:mm)

Premium Time

How would you like to  Weekly Timetabled

Tuesday					
Start	End	Activity	Num/Yr	PA	Hrs Hrs/Yr
09:00	11:00	Local clinical governance	42	0.50	2:00 84:00
11:00	12:00	Caldicott guardian	42	0.25	1:00 42:00
12:00	14:00	Administrative work directly related to clinical care	42	0.50	2:00 84:00
14:30	16:30	Clinical diagnostic work 30 minutes travel from Wimbledon Village hospital. 30 minutes travel to Putney hospital.	42	0.50	2:00 84:00
17:00	18:00	Other patient treatment	42	0.25	1:00 42:00
Totals: Core			2.00	8:00	336:00
APA			0.00	0:00	0:00

Once you have specified you have finished inputting all your activities, click on the 'Save & Continue' button.

**2.1.6. Resources**

This step of the wizard is optional, so you will only be able to see it if the Project Manager has enabled it in the Trust Settings. This step allows you to enter any resource requirements you may have. You can enter text into each of the fields up to a maximum of 7000 characters per box:

**Job Plan Wizard Step**

1.REQUIRED INFORMATION > 2.PERSONAL OBJECTIVES > 3.ON-CALL > 4.CYCLE > 5.ROUTINE WORK > 6.RESOURCES > 7.SUMMARY > 8.FINISH

Note: Please do not use this window for additional commentary or grievances. The final step in the wizard provides a comments area in which to present your ideas, suggestions or complaints.

**Staff**

**Equipment**

**Clinical Space**

**Other**

Click on the 'Save & Continue' button to proceed to the next step.

### 2.1.7. Summary

The Summary step groups together all of the work episodes recorded on your job plan by Category and Activity type. To drill into each category, click on the + symbol to the left of each header:

**Job Plan Wizard Step**

1.REQUIRED INFORMATION > 2.PERSONAL OBJECTIVES > 3.ON-CALL > 4.CYCLE > 5.ROUTINE WORK > 6.RESOURCES > 7.SUMMARY > 8.FINISH

Note: This step allows you to check if the balance of activities between PA types is consistent with national and local guidelines.  
Click the '+' sign on the left of each row to view a detailed breakdown of each category.

Summary of Programmed Activities

Category	Activity	Total PAs	Total hours
- DCC		1.95	7:49
	Admin other (please specify)	0.95	3:49
	/MDT	1.00	4:00
+ SPA		0.95	3:49
	Training	0.95	3:49
<b>Grand Totals:</b>		<b>2.91</b>	<b>11:38</b>

NB: Rounding to 2 decimal places may mean that there are small differences between totals and the detailed breakdown.

If you would like to exit the wizard and return at a later date please click save and exit. Continue

### 2.1.8. Finish

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.

**Job Plan Wizard Step**

1.REQUIRED INFORMATION > 2.PERSONAL OBJECTIVES > 3.ON-CALL > 4.CYCLE > 5.ROUTINE WORK > 6.RESOURCES > 7.SUMMARY > 8.FINISH

**Additional comments**

If you have any ideas, suggestions or complaints that you would like to be presented to your clinical manager or clinical director please include them here.

Request Sign Off Move To Discussion Save In Draft

If your Manager had provided you with a template job plan as a starting point which you subsequently changed, you will also see a field where you will need to provide reasons for changing the template:

**Job Plan Wizard Step**

1.REQUIRED INFORMATION > 2.PERSONAL OBJECTIVES > 3.ON-CALL > 4.CYCLE > 5.ROUTINE WORK > 6.RESOURCES > 7.SUMMARY > 8.FINISH

**Additional comments**

If you have any ideas, suggestions or complaints that you would like to be presented to your clinical manager or clinical director please include them here.

**Reason for change**

Please let Dr Signoff, Training know why you are making these change(s) and then click save and continue.

Request Sign Off Leave In Discussion

If you select 'Save in Draft', you will be taken back to your main screen.

If you select the 'Move to Discussion' option, you will have the option of leaving your job plan in Discussion, where it will remain editable to both yourself and your manager (please refer to section 3 for more details on the Discussion stage), or you can 'Request sign-off', which locks the job plan into read-only mode and indicates to your manager that you are happy for the job plan to be signed off immediately (refer to section 4):

If you leave your job plan in Draft, you can get back into the Wizard to edit any of the details or move the job plan to Discussion by clicking on the 'Edit Job Plan' button on the main screen:

The screenshot displays the 'My Job Plan' interface. On the left, there is a 'Messages & Alerts' section with a 'Send' button and a 'System Alert' dated 15 Jul 2009. Below that is a 'Reports' section with a 'View/print report' button. The main area is titled 'Current Job Plan: This job plan started 07 December 2010.' It contains a 'Draft (editable)' icon, an 'Activities Calendar' icon, and a list of details: Department: General Medicine, Total PAs to date: 0.00, Total hours to date: 0:00, Status: Draft - your job plan is editable, Contract type: Old, First Sign Off: Dr Manager2, C, and Second Sign Off: Dr Manager2, C. At the bottom, there are three buttons: 'Printable job plan', 'Objectives report', and 'Edit job plan', with the latter being circled in red.

You will be taken back into the final step of the wizard (Finish), but you can click back to any of the previous stages. To do this, simply click onto any of the options across the top of the screen:

**Job Plan Wizard Step**

1.REQUIRED INFORMATION > 2.PERSONAL OBJECTIVES > 3.ON-CALL > 4.CYCLE > 5.ROUTINE WORK > 6.RESOURCE > 7.SUMMARY > 8.FINISH

### 3. Discussion Stage

Once your job plan reaches the Discussion stage, it will be visible to your Manager(s). The person responsible for performing the first sign-off of your job plan will also have edit rights to your job plan (you can see who this is by checking the name displayed next to the First Sign Off field on your main screen).

The screenshot displays the 'My Job Plan' interface. On the left, there are sections for 'Messages & Alerts' and 'Reports'. The 'Messages & Alerts' section contains two system alerts: one stating that a manager cancelled a sign-off request, and another stating that a manager has requested a sign-off. The 'Reports' section has a dropdown menu for selecting a change report and a 'View/print report' button. The main area is titled 'Current Job Plan: This job plan started 25 September 2009.' It features a 'Discussion (editable)' icon, an 'Activities Calendar' icon, and a list of job plan details: Department (General Medicine), Total PAs to date (0.37), Total hours to date (1:29), Status (Discussion - your job plan is editable), and Changes (highlighted in red, indicating trust settings were changed by Mr. Manager, P). At the bottom, the 'First Sign Off' and 'Second Sign Off' fields both list 'Dr Manager2, C'. The 'First Sign Off' field is circled in red. At the bottom of the main area, there are buttons for 'Printable job plan', 'Objectives report', 'Edit job plan', and 'Request sign off'.

#### 3.1. Editing your job plan

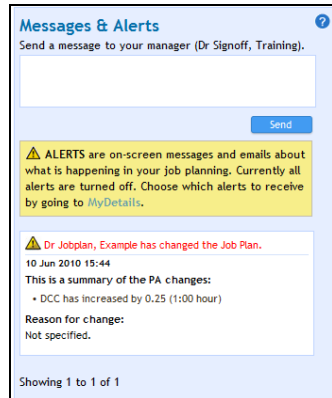
To edit your job plan once it is in the Discussion stage, simply click on the 'Edit job plan' button on the main screen:



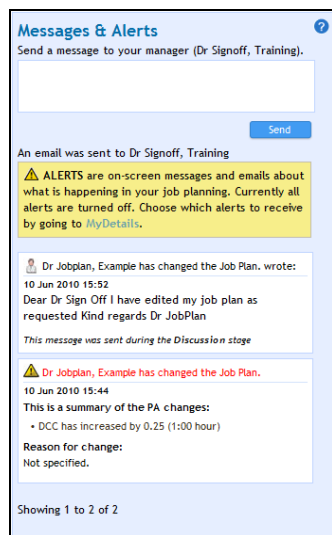
If any edits are made by either you or your Manager during the Discussion phase, these will be tracked by the system.

If your Manager makes any changes to your job plan, these will be flagged up on your main screen and also in the MESSAGES & ALERTS section on the left hand side of the screen. This is also the area you need to send messages to your 1<sup>st</sup> Sign Off Manager using e-JobPlan.



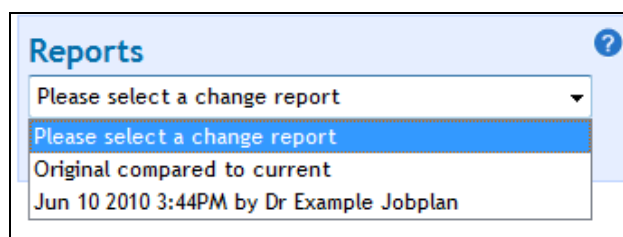


Once your message has been sent, it will be displayed beneath the 'Send A Message' section as shown below:



If your Manager responds to your message, you will receive a notification email as well as being able to see the message in the MESSAGES & ALERTS section.

There is also a Change Report in the system which will give the details of each individual change made. For more information on how to access this report, please refer to section 5.2 of the manual.



### 3.2. Mediation & Appeal

If your job plan is moved to either the Mediation or Appeal stage by your 1<sup>st</sup> Sign-Off Manager, the stage will be flagged up on the main screen and the details relating to the Mediation or Appeal process will be displayed further down the screen under the MEDIATION & APPEALS SECTION.

#### My Job Plan

##### Messages & Alerts

Send a message to your manager (Dr Manager2, C).

[Send](#)

---

**System Alert**  
15 Jul 2009 08:56  
Dear Dr Manager2, MyJobPlan now allows you to job-plan independently of "rounds". We have provisionally allocated a start date to all your current job plans, which is identical to the start date of your current round. You can change this date via the date picker in each job plan if you wish.

**System Alert**  
30 Nov 2008 19:11  
Dr C Manager1 has requested that you sign off your job plan.


Showing 1 to 2 of 3 [Show all](#)

##### Reports

Please select a change report

[View/print report](#)

#### Current Job Plan: This job plan started 20 October 2008.



[Activities Calendar](#)

**Department:** General Medicine

---

**Total PAs to date:** 4.25

---

**Total hours to date:** 17:00

---

**Status:** Mediation (2 stages remaining)  
This stage allows you to review your job plan.

---

**Contract type:** New

---

**First Sign Off:** Dr Manager2, C

---

**Second Sign Off:** Dr Manager2, C

[Printable job plan](#)   [Objectives report](#)   [View job plan](#)

#### Job plan library

Period	Current Stage	Level	Last Changed
20/10/2008	In 'Mediation' stage	General Medicine	07/12/2010 15:54:16
25/09/2008 --> ongoing	In 'Draft' stage	General Medicine	25/09/2008 18:20:24
09/09/2008 --> 24/09/2008	In 'Draft' stage	General Medicine	09/09/2008 12:22:21

#### Mediations & Appeals

**Type of action:**  
Mediation

---

**Bringer of action:**  
Doctor

Only your manager can move the job plan back into the Discussion stage.

Private & Confidential

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26 of 45

## 4. Sign Off Process

Your job plan may require one, two or three sign-offs depending on the Trust settings specified by your Project Manager. You will be able to see how many sign offs are required by checking your main screen.

The system will display a First, Second and Third sign-off field if three sign offs are required and the names of who will perform each one will also be displayed:

The screenshot shows the 'My Job Plan' interface. On the left, there are sections for 'Messages & Alerts' (with a system alert dated 15 Jul 2009) and 'Reports' (showing no version history). The main area is titled 'Current Job Plan: This job plan started 07 December 2010.' It displays a 'Discussion (editable)' stage with a notepad icon. Key details include: Department: General Medicine, Total PAs to date: 2.83, Total hours to date: 11:00, Status: Discussion - your job plan is editable (with a note that you and your manager can edit/review), and Contract type: Old. The 'First Sign Off' and 'Second Sign Off' fields are both populated with 'Dr Manager2, C' and are circled in red. At the bottom, there are buttons for 'Printable job plan', 'Objectives report', 'Edit job plan', and 'Request sign off'.

### 4.1. Requesting Sign Off

Once a job plan reaches the Discussion stage (where a job plan is editable by both yourself and your First Sign-Off Manager), both you and your Manager will need to agree with the job plan details before it can be signed off. To indicate that agreement has been reached, either party can **'Request Sign-Off'**.

Once there has been a request to sign-off by either yourself or the Manager, the job plan will be locked down into read-only mode and the other party will need to either agree with the job plan or move the job plan back to the discussion stage for further editing.

**'Agree with job plan'**- the request will automatically move the job plan to the signed-off stage.

**'Move job plan back to discussion'**- this will keep the job plan in the Discussion stage and it will become editable again.

If you would like to request sign-off for your job plan, click on the 'Request Sign Off' button on the main screen:

The screenshot shows the 'My Job Plan' interface. On the left, there are sections for 'Messages & Alerts' and 'Reports'. The main area is titled 'Current Job Plan: This job plan started 07 December 2010.' It features a 'Discussion (editable)' icon and a list of details:

- Department: General Medicine
- Total PAs to date: 2.83
- Total hours to date: 11:00
- Status: Discussion - your job plan is editable. In this stage, you and your manager can edit/review your job plan before you agree to it.
- Contract type: Old
- First Sign Off: Dr Manager2, C
- Second Sign Off: Dr Manager2, C

At the bottom, there are buttons for 'Printable job plan', 'Objectives report', 'Edit job plan', and 'Request sign off'. The 'Request sign off' button is circled in red.

Once you have done this, the 'Edit Job Plan' button will disappear and a 'Cancel Request' option will appear. Clicking on 'Cancel Request' will notify your Manager that you have retracted the request:

The screenshot shows the 'My Job Plan' interface. The 'Current Job Plan' section is now in an 'Awaiting 1st sign-off (read only)' state. The details are:

- Department: General Medicine
- Total PAs to date: 5.67
- Total hours to date: 22:00
- Status: Awaiting 1st Sign-Off - Your job plan is now read-only. You have asked your manager to agree to the current version of your job plan, and are awaiting your manager's reply.
- Contract type: New
- First Sign Off: Dr Manager2, C
- Second Sign Off: Dr Manager2, C

At the bottom, the 'Edit job plan' button has disappeared, and a new 'Cancel request to sign off' button has appeared, circled in red. A yellow banner at the bottom reads: 'Currently waiting for Dr Manager2, C to action your request. If you wish to edit your job plan further, click CANCEL REQUEST TO SIGN OFF.'

When your manager either agrees with the job plan or moves the job plan back to the discussion stage, you will receive a notification email from the system and this will also be displayed on the MESSAGES & ALERTS section on the main screen.

If it is your Manager who has requested sign-off, then this will be flagged up on the main screen and you will see two buttons 'Agree with job plan' or 'Send back to discussion':

The screenshot shows the 'My Job Plan' interface in the e-JobPlan system. The main header includes 'My Job Plan' and 'Support'. The 'Messages & Alerts' section contains a message from Dr Manager2, C, dated 08 Dec 2010 09:21, requesting a sign-off. Below it, a 'System Alert' from 07 Dec 2010 17:11 indicates a change in the job plan, specifically an increase in SPA from 11:00 to 11:00 hours. The 'Reports' section has a dropdown menu for selecting a change report. The 'Current Job Plan' section, titled 'This job plan started 07 December 2010.', displays the following details:

- Department: General Medicine
- Total PAs to date: 2.83
- Total hours to date: 11:00
- Status: Awaiting 1st Sign-Off - Your job plan is now read-only. Your manager is happy with your job plan, and has asked you to formally agree to it.
  - If you are also happy with your job plan, please click on "AGREE WITH JOB PLAN". Select "View Job plan" from the REPORTS section below if you want to view the current version of your plan before you agree to it.
  - If you are not happy with your plan yet, please click on "SEND BACK TO DISCUSSION"; this will take your plan back into the discussion stage and allow you to make changes.
- Contract type: New
- First Sign Off: Dr Manager2, C
- Second Sign Off: Dr Manager2, C

At the bottom of the 'Current Job Plan' section, there are buttons for 'Printable job plan', 'Objectives report', and 'View job plan'. A yellow banner at the very bottom of the page contains the text: 'Dr Manager2, C has requested that you formally agree to this job plan.' with buttons for 'Agree with job plan' and 'Send back to discussion'.

If you select 'Agree with job plan' and there are two levels of sign off, the job plan will move to the 'Awaiting 2<sup>nd</sup> Sign-Off' stage.

To view any of the details of your job plan while a sign-off request is pending, you will need to use the Reports section on the main screen (please refer to section 5 for more information on Reports).

#### 4.2. Provisional (first) Sign Off

If either you or your Manager accept a Request to sign-off, your job plan will move straight into the 'Awaiting 2<sup>nd</sup> sign off' stage (or Signed-Off stage if only one sign off is required at your Trust).

**My Job Plan**

**Messages & Alerts** ?  
Send a message to your manager (Dr Manager2, C).

**System Alert**  
07 Dec 2010 16:51  
Dr Manager2, C has requested that you sign off your job plan.

**System Alert**  
15 Jul 2009 08:56  
Dear Dr on10, MyJobPlan now allocates provisional start dates to each job plan on page 1 of the wizard. You can change this if you wish by using the date-picker for this entry.  
Showing 1 to 2 of 3

**Reports** ?  
There is no Version History

**Current Job Plan:** This job plan started 07 December 2010. ?

**Department:** General Medicine

**Total PAs to date:** 7.92

**Total hours to date:** 31:00

**Status:** Awaiting 2nd sign-off - your job plan is no longer editable  
Your manager is happy with your job plan, and has asked you to formally agree to it.  
- If you are also happy with your job plan, please click on "AGREE WITH JOB PLAN". Select "View job plan" from the REPORTS section below if you want to view the current version of your plan before you agree to it.  
- If you are not happy with your plan yet, please click on "SEND BACK TO DISCUSSION"; this will take your plan back into the discussion stage and allow you to make changes.

**Contract type:** New

**First Sign Off:** Dr Manager2, C

**Second Sign Off:** Dr Manager2, C

A job plan in the 'Awaiting 2nd Sign-Off' stage is locked down into read-only mode

### 4.3. Final (second or third) Sign Off

If the job plan requires two sign offs, once a job plan reaches Awaiting 2<sup>nd</sup> Sign-Off stage, the designated Second Sign-Off Manager will be alerted by the system. They will not have edit rights to your job plan, but will be able to review the details in read-only mode.

The Second Sign-Off Manager will now either move the job plan to the Final Sign-Off stage or move the job plan back into the Discussion stage if they do not agree with the details. Under either of the two options you will receive an email from the system to notify you of the action taken.

**My Job Plan**

**Messages & Alerts** ?  
Send a message to your manager (Dr Manager2, C).

**System Alert**  
07 Dec 2010 16:55  
Dr Manager2, C accepted the request to sign off your job plan.

**System Alert**  
07 Dec 2010 16:51  
Dr Manager2, C has requested that you sign off your job plan.  
Showing 1 to 2 of 4

**Current Job Plan:** This job plan started 07 December 2010. ?

**Department:** General Medicine

**Total PAs to date:** 7.92

**Total hours to date:** 31:00

**Status:** Signed-off - your job plan is no longer editable

**Contract type:** New

**First Sign Off:** Dr Manager2, C

**Second Sign Off:** Dr Manager2, C

Once the Final Sign-Off stage has been reached, the job planning process has finished.

## 5. Reports

On the main screen, under the REPORTS section, there are 3 reports you can generate.

### 5.1. Job Plan Report

This report allows you to print off a hard copy of all the information contained in your job plan. Select the 'Printable Job Plan' button:

**My Job Plan**

**Messages & Alerts**

Send a message to your manager (Dr Manager2, C).

**System Alert**  
07 Dec 2010 16:55  
Dr Manager2, C accepted the request to sign off your job plan.

**System Alert**  
07 Dec 2010 16:51  
Dr Manager2, C has requested that you sign off your job plan.

Showing 1 to 2 of 4

**Current Job Plan:** This job plan started 07 December 2010.

**Department:** General Medicine

**Total PAs to date:** 7.92

**Total hours to date:** 31:00

**Status:** Signed-off - your job plan is no longer editable

**Contract type:** New

**First Sign Off:** Dr Manager2, C

**Second Sign Off:** Dr Manager2, C

Buttons: **Printable job plan** (circled), Objectives report, View job plan

You may also tick the 'show' button on the right hand side to allow you to select what information on the job plan you would like to view. You also have the option to 'Export to Word' in the top right hand corner.

**MYJOBPLAN TRAINING (MJP3).**

This job plan started 07 December 2010.

[Job plan for Dr C on 11 in General Medicine](#)

**BASIC INFORMATION**

**Show**

Job plan status	2nd sign-off agreed
Appointment	Full Time
Cycle	Rolling cycle - 1 week
Report date	16 Dec 2010
Expected number of weeks in attendance	42
Number of weekdays for on-call purposes	4 (Monday to Thursday)
Alternate employer	None Specified
Contract	New

For On-Call Availability you can either choose 'View Summary' to show a summary of the on-call information or 'View Detail' to see the actual information entered into the on-call section of the job plan wizard.

ON-CALL AVAILABILITY		Show <input checked="" type="checkbox"/>
<input type="radio"/> View Summary <input checked="" type="radio"/> View Detail		
Works on-call?	Yes	
<b>General Settings:</b>		
Do you work on-call at weekends?	Yes	
Frequency	1 in 8	
<b>Weekday predictable on-call work:</b>		
What are your average hours of predictable emergency work per weekday on-call?	4:00	
How much of this work takes place between 19:00 & 07:00?	0:00	
Does this work replace or run concurrently with other activities?	No	
How much work replaces or runs concurrently with other activities?	0:00	
<b>Weekday unpredictable on-call work:</b>		
What are your average hours of unpredictable emergency work per weekday on-call?	0:00	
How much of this work takes place between 19:00 & 07:00?	0:00	
Do you work your on-call on a specific day?	No fixed day	
<b>Weekend on-call work:</b>		
What are your average hours of predictable emergency work per weekend on-call?	0:00	
How much of this work takes place after 19:00 on Friday?		
Does this work replace or run concurrently with other activities?	No	
What are your average hours of unpredictable emergency work per weekend on-call?	0:00	
How much of this work takes place after 19:00 on Friday?		
<b>Other Information:</b>		
Where does your on-call work take place?	Clinic A	
Category	B	
<b>PA Count:</b>		
The number of PAs arising from your predictable on-call work is:	0.59	
The number of PAs arising from your unpredictable on-call work is:	0.00	
The number of hours arising from your predictable on-call work is:	2:22	
The number of hours arising from your unpredictable on-call work is:	0:00	
Supplement	2%	
Comments:		

## 5.2. Objectives Report

This report shows how the objectives and activities are being linked. The report also shows the doctors PA contribution compared with the Department's. Select the 'Objectives report' button:

### My Job Plan

**Messages & Alerts**

Send a message to your manager (Dr Manager2, C).

[Send](#)

**System Alert**


07 Dec 2010 16:55  
Dr Manager2, C accepted the request to sign off your job plan.

**System Alert**

07 Dec 2010 16:51  
Dr Manager2, C has requested that you sign off your job plan.

Showing 1 to 2 of 4 [Show all](#)

**Current Job Plan:** This job plan started 07 December 2010.



Activities Calendar

**Department:** General Medicine

---

**Total PAs to date:** 7.92

---

**Total hours to date:** 31:00

---

**Status:** Signed-off - your job plan is no longer editable

---

**Contract type:** New

---

**First Sign Off:** Dr Manager2, C

---

**Second Sign Off:** Dr Manager2, C

[Printable job plan](#)
[Objectives report](#)
[View job plan](#)

The report will display in a new window, and you will be able to view the linked and non linked Personal, Service and Trust objectives. There is a legend to help you identify which category the activities are.

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32 of 45



Dr Consultant99, E  
 General Medicine  
 Job Plan Start Date: 8/12/2010  
 Report Date: 16/12/2010

**Personal Objectives:**  
 This is a list of personal objectives, the activities they are linked to and any service objectives they are linked to.

**Personal Objective 2**  
 Example objective

Linked Activities	No Of activities	Duration	Total time	PA Values	Dept PA's
CPD	1	1	1	0.21	2.81

Linked service objective: Organisation & Delivery

**Non Linked Personal Objectives**  
 This is a list of personal objectives which are not linked to activities. These objectives may be linked to service objectives.

**Personal Objective 1**  
 Example objective

Linked Activities	No Of activities	Duration	Total time	PA Values	Dept PA's
No linked activities					

Linked service objective: Governance, Training, Teaching & Research

**Service Objective Linked Activities**  
 This is a list of service objectives which are linked to activities. These objectives are not linked to personal objectives.

**Clinical Care**  
 Objective 1

Linked Activities	No Of activities	Duration	Total time	PA Values	Dept PA's
Operating sessions	1	4	4	1	9

**Non-Linked Activities**  
 This is a list of the doctors activities which are not linked to any objective.

Non-Linked Activities	No Of activities	Duration	Total time	PA Values	Dept PA's
Clinical Director	1	4	4	0.25	1
Operating sessions	1	3.5	3.5	0.47	9
Predictable Emergency Work	1	0.65	0.65	1	5.5
Travel	1	3	3	0.05	0.75
Unpredictable Emergency Work	1	0.32	0.32	0.5	3.33
Ward rounds	1	0.5	0.5	0.07	1.75

**Legend:**

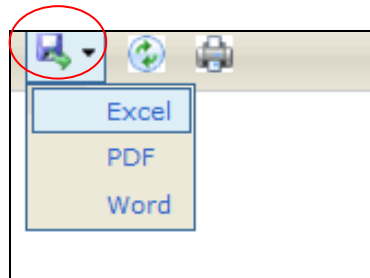
- Direct Clinical Care
- Supporting Professional Services
- Additional NHS Responsibilities
- Fee Paying Services
- Private Professional Services
- Medical School
- External Duties

The report contains the following information:

- Number of activities
- Duration
- Total time
- PA Values

- Dept PA's
- Non-linked Personal Objectives
- Service Objective Linked Activities
- Non-Linked Activities

You can export the report into Excel, Word or PDF by clicking on the small disk icon in the top right hand corner of the report. You can refresh the report and print it by clicking on the relevant icon.



### 5.3. Changes Report

The Changes Report tracks any edits made to your job plan while it is in the Discussions 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:

#### My Job Plan

##### Messages & Alerts

Send a message to your manager (Dr Manager2, C).

**System Alert**  
07 Dec 2010 16:55  
Dr Manager2, C accepted the request to sign off your job plan.

**System Alert**  
07 Dec 2010 16:51  
Dr Manager2, C has requested that you sign off your job plan.

Showing 1 to 2 of 4

##### Reports

Please select a change report

- Please select a change report
- Original compared to current  
Dec 7 2010 4:50PM by Dr C on10

#### Current Job Plan: This job plan started 07 December 2010.

**Department:** General Medicine

**Total PAs to date:** 7.92

**Total hours to date:** 31:00

**Status:** Signed-off - your job plan is no longer editable

**Contract type:** New

**First Sign Off:** Dr Manager2, C

**Second Sign Off:** Dr Manager2, C

Printable job plan   Objectives report   View job plan

#### Job plan library

Period	Current Stage	Level	Last Changed
07/12/2010 --> ongoing	2nd sign-off agreed	General Medicine	07/12/2010 16:55:08
25/09/2008 --> 06/12/2010	1st sign-off agreed - awaiting 2nd sign off agreement	General Medicine	14/10/2008 16:08:05
09/09/2008 --> 24/09/2008	In 'Draft' stage	General	09/09/2008 16:47:00

The changes report 'Original compared to current' report will display in a new window,

**MYJOBPLAN TRAINING (MJP3).**

This job plan started 07 December 2010.

Changes made on 07 Dec 2010 17:11 compared to 07 Dec 2010 17:11 for the Job Plan of Dr on11, C

**CHANGES MADE BY DR C ON11****Basic information**

	Actual	Previous
Cycle length	Rolling cycle - 1 week	Rolling cycle - 1 week
1 PA of premium time	3 hours	3 hours
Start Date	07 December 2010	07 December 2010

**Summary of PA changes: changed activities highlighted**

	Normal Time PAs	Premium Time PAs	Actual PAs	Previous PAs	Difference
Supporting Professional Activities					
Appraisal	2.5	0.33	2.83	0	2.83
<b>Total</b>	<b>2.5</b>	<b>0.33</b>	<b>2.83</b>	<b>0</b>	<b>2.83</b>
<b>Grand Total</b>	<b>2.5</b>	<b>0.33</b>	<b>2.83</b>	<b>0</b>	<b>2.83</b>

## 6. Old Job Plans

If you wish to view a Job Plan from a previous round of job planning, you can locate the historic job plans at the bottom of the main screen. The job plan being displayed on the main screen will always be the job plan which is indicated by the blue arrow shown below:

**My Job Plan**

**Messages & Alerts**

Send a message to your manager (Dr Manager2, C).

**Dr on11, C has changed the Job Plan.**  
07 Dec 2010 17:11  
This is a summary of the PA changes:  
• SPA has increased by 2.83 (11:00 hours)  
Reason for change:  
Not specified.

**System Alert**  
15 Jul 2009 08:56  
Dear Dr on11, MyJobPlan now allocates provisional start dates to each job plan on page 1 of the wizard. You can change this if you wish by using the date-picker for this entry.

Showing 1 to 2 of 3 [Show all](#)

**Reports**

Please select a change report

[View/print report](#)

**Current Job Plan:** This job plan started 07 December 2010.

**Department:** General Medicine

**Total PAs to date:** 2.83

**Total hours to date:** 11:00

**Status:** Discussion - your job plan is editable  
In this stage, you and your manager can edit/review your job plan before you agree to it.

**Contract type:** New

**First Sign Off:** Dr Manager2, C

**Second Sign Off:** Dr Manager2, C

[Printable job plan](#) [Objectives report](#) [Edit job plan](#) [Request sign off](#)

**Job plan library**

Period	Current Stage	Level	Last Changed
07/12/2010	In 'Discussion' stage	General Medicine	07/12/2010 17:11:15
25/09/2008 --> ongoing	In 'Draft' stage	General Medicine	20/10/2008 12:43:18

## 7. Activities Calendar

The Activities Calendar allows both doctors and managers to see who is doing what on any given day within their own department. Doctors can access this from their main screen.

**N.B. The 'Activities Calendar' may be greyed out if it has not been switched on by the Project Manager.**

### My Job Plan

#### Messages & Alerts

Send a message to your manager (Dr Manager2, C).

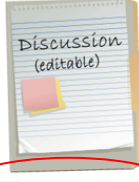
[Send](#)

**System Alert**  
09 Nov 2009 15:15  
Dr C Manager2 cancelled the request for you to sign off your job plan.

**System Alert**  
09 Nov 2009 15:15  
Dr C Manager2 has requested that you sign off your job plan.

Showing 1 to 2 of 4 [Show all](#)

#### Current Job Plan: This job plan started 25 September 2009.



**Department:** General Medicine

**Total PAs to date:** 0.37

**Total hours to date:** 1:29

**Status:** Discussion - your job plan is editable  
In this stage, you and your manager can edit/review your job plan before you agree to it.

**Changes:** Since your last edits some changes have been made to the job plan.  
Mr Manager, P has changed Trust settings.  
This has not resulted in a change to your total PAs.

For more information about the Trust changes, please refer to the alerts or contact your Project Manager for more information.

**Contract type:** New

**First Sign Off:** Dr Manager2, C

**Second Sign Off:** Dr Manager2, C

#### Reports

Please select a change report

[View/print report](#)

[Printable job plan](#)   [Objectives report](#)   [Edit job plan](#)   [Request sign off](#)

### Activities Calendar

Need help? [Click here.](#)

[\[-\] Hide selection panel](#)

1. Select doctor names and click on arrow to include

- Dr16, T (SAS)
- Dr17, T (SAS)
- Dr Consultant, D
- Dr Consultant, G

\* Press and hold the ctrl key to select multiple doctors.

**CLICK** →

2. Doctors included in Activity Calendar

Name	Job Plan	Starting Week
Please select a doctor.		

[Clear all](#)

[Update Report](#)

**Legend:**  All  DCC (D)  SPA (S)  ANR (A)  ED (E)  FPS (F)  PPS (P)  MS (M)

◀ today ▶ 14/06/2010 - 20/06/2010   Activity View   Doctor View   Day   Week   Timeline

14/06/2010	15/06/2010	16/06/2010	17/06/2010	18/06/2010	19/06/2010	20/06/2010
------------	------------	------------	------------	------------	------------	------------

The panel on the left hand side will display the names of all doctors who have a signed off job plan. Once you have selected the doctors you wish to view, click 'Click'.

### Activities Calendar

Need help? [Click here.](#)

[ - ] Hide selection panel

1. Select doctor names and click on arrow to include

Dr Consultant, G

**CLICK** →

2. Doctors included in Activity Calendar

Name	Job Plan	Starting Week	
Dr 16, T (SAS)	09/11/2009 -> ongoing	1	<a href="#">Remove</a>
Dr 17, T (SAS)	09/11/2009 -> ongoing	1	<a href="#">Remove</a>
Dr Consultant, D	02/12/2009 -> ongoing	1	<a href="#">Remove</a>

[Clear all](#)

\* Press and hold the ctrl key to select multiple doctors.

[Update Report](#)

Legend:  All  DCC (D)  SPA (S)  ANR (A)  ED (E)  FPS (F)  PPS (P)  MS (M)

◀ today ▶ 14/06/2010 - 20/06/2010 Activity View Doctor View Day Week **Timeline**

14/06/2010	15/06/2010	16/06/2010	17/06/2010	18/06/2010	19/06/2010	20/06/2010

You can then align the ‘Starting Week’ of the calendar with the cycle of the job plan if the job plan cycle is more than 1 week. Once you have made the necessary changes, click ‘Update Report’.

### Activities Calendar

Need help? [Click here.](#)

[ - ] Hide selection panel

1. Select doctor names and click on arrow to include

Dr Consultant, G

**CLICK** →

2. Doctors included in Activity Calendar

Name	Job Plan	Starting Week	
Dr 16, T (SAS)	09/11/2009 -> ongoing	1	<a href="#">Remove</a>
Dr 17, T (SAS)	09/11/2009 -> ongoing	1	<a href="#">Remove</a>
Dr Consultant, D	02/12/2009 -> ongoing	1	<a href="#">Remove</a>

[Clear all](#)

\* Press and hold the ctrl key to select multiple doctors.

[Update Report](#)

Legend:  All  DCC (D)  SPA (S)  ANR (A)  ED (E)  FPS (F)  PPS (P)  MS (M)

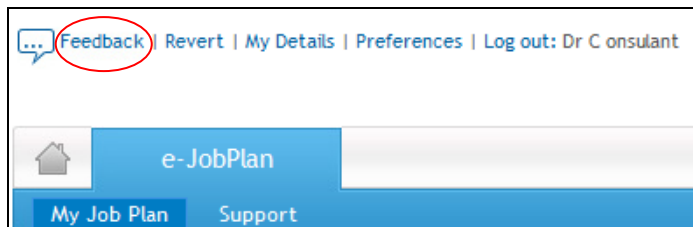
◀ today ▶ 14/06/2010 - 20/06/2010 Activity View Doctor View Day Week **Timeline**

14/06/2010	15/06/2010	16/06/2010	17/06/2010	18/06/2010	19/06/2010	20/06/2010
09:00 - 12:00 clinic	09:00 - 17:00 Out-patient	09:00 - 10:00 Clinical	09:00 - 14:00 Flexible	09:00 - 10:00 Clinical tutor		
09:00 - 18:00 Endoscopy		09:00 - 15:00 Formal	09:00 - 15:00 Royal	09:00 - 10:00 Patient		
10:00 - 12:00 clinic		10:00 - 13:00 clinic	14:00 - 17:00 CPD	10:00 - 11:00 Lead		
12:00 - 17:00 Out-patient		13:00 - 16:00 Patient		10:00 - 17:00 Out-patient		
		16:00 - 17:00		11:00 - 16:00 Private		
				16:00 - 17:00 Admin other		

Once you have generated the Activities Calendar, you can then choose if you would like to see an activity view or doctor view (this allows you to view activity by consultant). You can also choose to view a timeline, day or week view. If you hover your mouse over each activity box you will see further information. You have a further option to view all activities or to specify if you would like to see DCC, SPA activities etc. Each category is assigned a different colour so that the various activities can be identified more easily.

## 8. Sending Feedback

Zircadian welcomes feedback of any description from users. All feedback is logged and discussed at monthly meetings. In order to submit feedback, click 'Feedback' in the top left hand corner.



Fill out the feedback form and click 'Send' where it will be sent directly to Zircadian. If we need further clarification on your feedback, we will contact you via your Board email address. If you are sending a suggestion on how we can improve the system, we will inform you on a decision to implement once our monthly meeting has taken place.

Send feedback

### Feedback Form

We welcome feedback from users to help us make Zircadian's software the best possible service. Please complete the form below giving further details of your enquiry/feedback.

Type of enquiry: \*

Trust: \*

Your name: \*

Email: \*

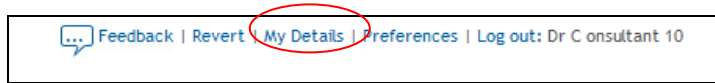
Phone:

Feedback:

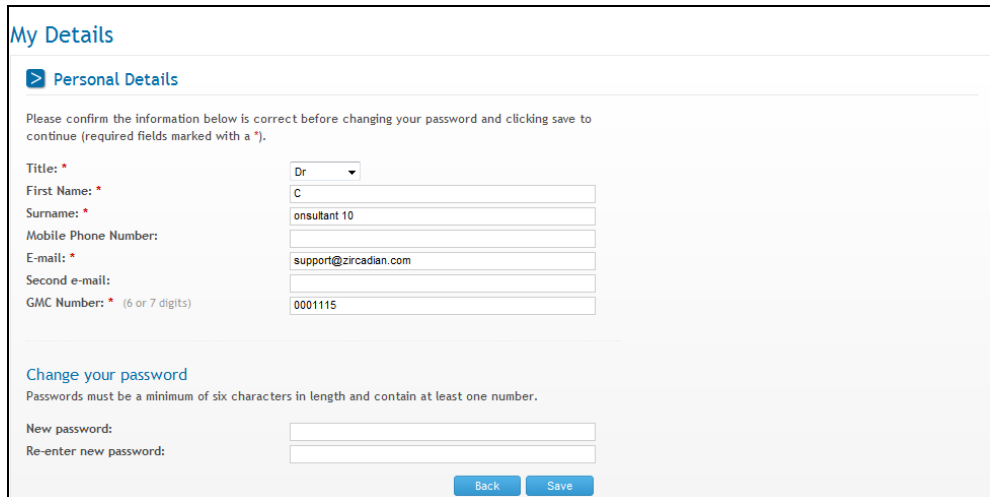


## 9. My Details

Click on 'My Details' at the top of the screen to view them.



On the My Details tab you can change any of your personal details, including your password:



**My Details**

**Personal Details**

Please confirm the information below is correct before changing your password and clicking save to continue (required fields marked with a \*).

Title: *	Dr
First Name: *	C
Surname: *	onsultant 10
Mobile Phone Number:	
E-mail: *	support@zircadian.com
Second e-mail:	
GMC Number: * (6 or 7 digits)	0001115

**Change your password**

Passwords must be a minimum of six characters in length and contain at least one number.

New password:	
Re-enter new password:	

Back Save

Make any changes and then click on 'Save' at the bottom of the screen.

## 10. Preferences

On the Preferences tab you can set preferences for which type of alerts you would like the system to send you during the job planning process:

The screenshot shows the 'Change your preferences' interface in the e-JobPlan application. The browser title bar indicates 'e-JobPlan' and a 'help' icon is visible in the top right corner. The main heading is 'Change your preferences'. Underneath, the 'Your job plan preferences' section includes a list of alert types with checkboxes, all of which are currently unchecked. Below this list is a section for 'I would like my alerts to automatically hide after:' with radio buttons for 2, 3, 4, 5, and 6 months; the '3 months' option is selected. The 'Email preferences' section contains a single checked checkbox for 'Send email to consultant when manager makes changes to a jobplan'. At the bottom right of the form, there are 'Back' and 'Save' buttons.

Make any changes by ticking or un-ticking the appropriate boxes and then click on 'Save' at the bottom of the screen.

## 11. Support

The Support tab will display the contact details of the Project Manager at the Board as well as the e-JobPlan Help Desk details. It provides our contact number, general email address and our opening hours.

From here you can also download a copy of the 2003 Consultants Contract, Job Planning Best Practice, Definitions and Calculations used in e-JobPlan and User Manuals. There are also Release Notes which detail any changes made to the system recently:

The screenshot shows the 'Support' page in the e-JobPlan system. The page is titled 'Help & Support' and contains several sections:

- Trust Contact Details:** Name - Dr Mac 3, Email - mjpsupport@zircadian.com
- Zircadian support:** The Zircadian support team is available to help you with any aspect of job planning and using the MyJobPlan software. Our dedicated team can assist you with issues such as user accounts, entering your job plan and any technical problems you may have.
  - Opening hours:** 09:00 to 17:30 Monday to Friday
  - Getting in touch:** by phone 020 8946 8199, by e-mail support@zircadian.com
- Documents:**
  - National Documents:**
    - Consultants job planning best practice (NHS Employers)
    - Consultants contract latest terms and conditions
  - MyJobPlan Documents:**
    - Definitions and Calculations in MyJobPlan
  - User Manuals:**
    - Consultant Manual
    - Manager Manual

If you require further help, the Zircadian Support Team is available Monday to Friday between the hours of 09:00 and 17:30. Contact details can be found by clicking on “The support team” link at the bottom of the screen.

The screenshot shows the footer area of the e-JobPlan Support page. It contains the following information:

- Changes to e-JobPlan version 4.1
- Changes to e-JobPlan version 4.0
- Online Tutorials:**
  - Drafting your job plan and moving it to discussion
  - Manager's dashboard demo
- Footer: Send feedback | Terms and conditions | Accessibility | [The support team](#) | v5.1 | Powered by:

Alternatively additional contact information is visible within the “My details” page which you can access through the “My details” link at the top of any page:

Feedback | Revert | My Details | Preferences | Log out: Dr P Manager

e-JobPlan help

### My Details

#### Personal Details

Please confirm the information below is correct before changing your password and clicking save to continue (required fields marked with a \*).

Title: \*

First Name: \*

Surname: \*

Mobile Phone Number:

E-mail: \*

Second e-mail:

GMC Number: \* (6 or 7 digits)

---

#### Change your password

Passwords must be a minimum of six characters in length and contain at least one number.

New password:

Re-enter new password:

## 12. Logging Out

To log out of e-JobPlan, click the 'Log out' button in the top left hand side hand of the screen:

