



HealthRoster

HealthMedics

HealthAssure

Reporting by Exception

Quick guide for doctors

December 2016

V1.2

Private & Confidential footer goes here

- Account setup
- Receiving login details
- Setting password

- Dashboard
- Viewing reports
- Creating a report

- Agree/Disagree with outcome

Once your account has been setup you will receive an email from us with a temporary password. Select the link from the email or enter: <https://www.healthmedics.allocatehealthsuite.com> directly into your browser.

You may wish to save this link as a home screen icon on your smart device. Use the **add to home screen** option in your browser's menu to add the link.

Enter your login details as they appear in the email. Ensure that no blank spaces appear at the end of your credentials and click **login**.

HealthMedics

Login Details

Username

Password

Remember me

Login

[Forgotten your username/password?](#)

If this is your first use of the system, you will be requested to check and update your personal details.

Your name, work email address and GMC/GDC number (where applicable) will have been populated already by your local system administrator.

The remaining fields are non-mandatory and can updated at a later stage. If you choose to add a secondary or personal email address, any automated system notifications will be sent to both addresses.

Update Your Personal Details

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

Title: *

First Name: *

Surname: *

Telephone Number:

Mobile Phone Number:

E-mail: *

Personal E-mail:

Gender:

Date of Birth:

Address Line 1:

Address Line 2:

Address Line 3:

City:

County:

Postcode:

Awaiting GMC Number:

GMC Number: * (6 or 7 digits)

Help & Support:

Allocate Software PLC
1 Church Road
Richmond
TW9 2QU

Phone: 0844 4179512
Fax: 0844 4179512
E-mail: info@allocatesoftware.com
Web: www.allocatesoftware.com

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: *

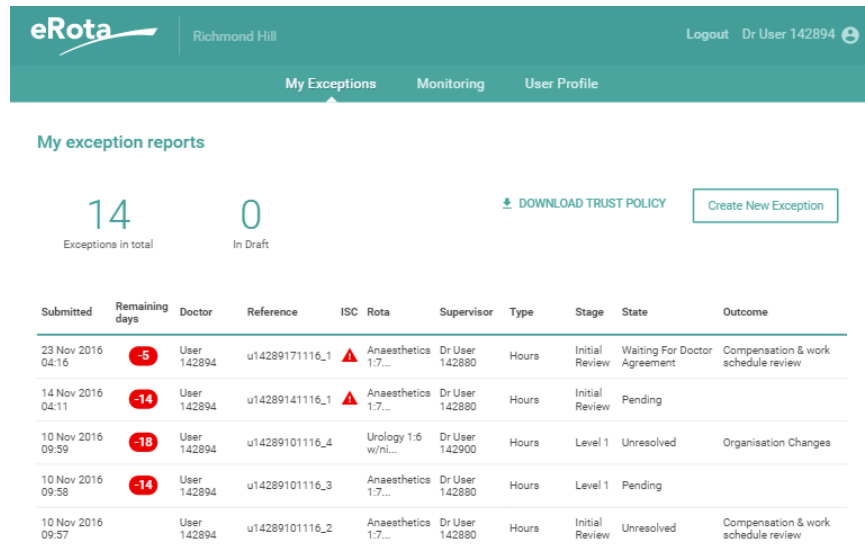
Logout
Save

The dashboard will list all of the exceptions that have been raised by you. From here you will also be able to create a new exception and downloaded your organisation’s policy if they have uploaded one.

The key metrics display your total exception reports created and those in draft that have been saved but not yet submitted to your supervisor.

The dashboard will display key information such as the submitted date, doctor name and the current stage of the report. In addition, you’ll see the number of remaining days until the next decision needs to be made (by the organisation or yourself) and whether the report was linked to an immediate safety concern involving yourself or patients.

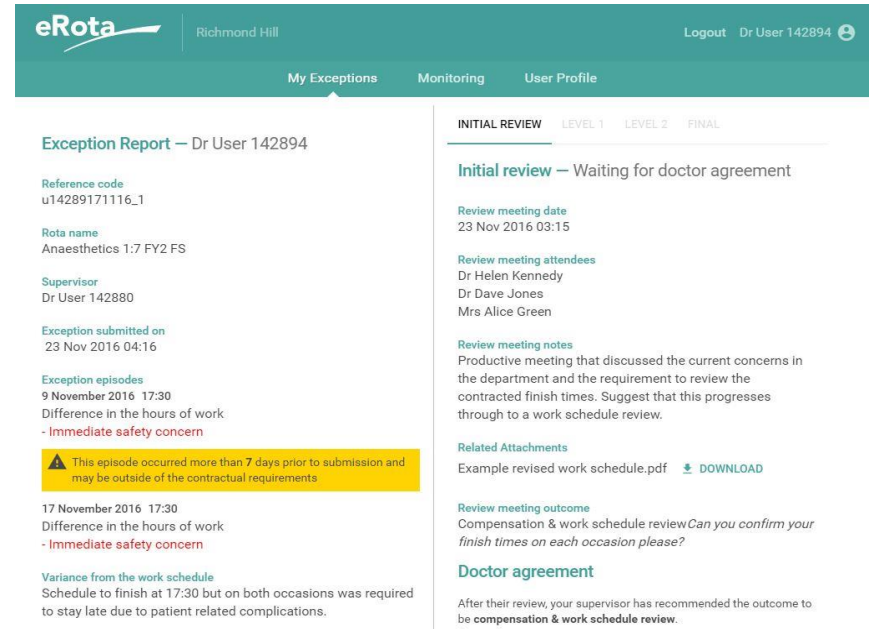
Click on any of the rows in the dashboard to view the individual exception report details.



The screenshot shows the eRota dashboard interface. At the top, there is a navigation bar with the eRota logo, the location 'Richmond Hill', and a user profile section with 'Logout' and 'Dr User 142894'. Below the navigation bar are three tabs: 'My Exceptions', 'Monitoring', and 'User Profile'. The main content area is titled 'My exception reports' and features two large metrics: '14 Exceptions in total' and '0 In Draft'. There are two buttons: 'DOWNLOAD TRUST POLICY' and 'Create New Exception'. Below these metrics is a table of exception reports.

Submitted	Remaining days	Doctor	Reference	ISC Rota	Supervisor	Type	Stage	State	Outcome
23 Nov 2016 04:16	-5	User 142894	u14289171116_1	▲ Anaesthetics 1:7...	Dr User 142880	Hours	Initial Review	Waiting For Doctor Agreement	Compensation & work schedule review
14 Nov 2016 04:11	-14	User 142894	u14289141116_1	▲ Anaesthetics 1:7...	Dr User 142880	Hours	Initial Review	Pending	
10 Nov 2016 09:59	-18	User 142894	u14289101116_4	Urology 1:6 w/nl...	Dr User 142900	Hours	Level 1	Unresolved	Organisation Changes
10 Nov 2016 09:58	-14	User 142894	u14289101116_3	Anaesthetics 1:7...	Dr User 142880	Hours	Level 1	Pending	
10 Nov 2016 09:57		User 142894	u14289101116_2	Anaesthetics 1:7...	Dr User 142880	Hours	Initial Review	Unresolved	Compensation & work schedule review

After selecting the report you wish to view you will be taken through to the report itself, by selecting each of the stages to the right of the screen you will be able to view the information contained within each section, to navigate back to the dashboard simply select 'My Exceptions' from the top/centre of the screen:



eRota | Richmond Hill | Logout | Dr User 142894

My Exceptions | Monitoring | User Profile

Exception Report – Dr User 142894

Reference code
u14289171116_1

Rota name
Anaesthetics 1:7 FY2 FS

Supervisor
Dr User 142880

Exception submitted on
23 Nov 2016 04:16

Exception episodes
9 November 2016 17:30
Difference in the hours of work
- Immediate safety concern

⚠ This episode occurred more than 7 days prior to submission and may be outside of the contractual requirements

17 November 2016 17:30
Difference in the hours of work
- Immediate safety concern

Variance from the work schedule
Schedule to finish at 17:30 but on both occasions was required to stay late due to patient related complications.

INITIAL REVIEW | LEVEL 1 | LEVEL 2 | FINAL

Initial review – Waiting for doctor agreement

Review meeting date
23 Nov 2016 03:15

Review meeting attendees
Dr Helen Kennedy
Dr Dave Jones
Mrs Alice Green

Review meeting notes
Productive meeting that discussed the current concerns in the department and the requirement to review the contracted finish times. Suggest that this progresses through to a work schedule review.

Related Attachments
Example revised work schedule.pdf [DOWNLOAD](#)

Review meeting outcome
Compensation & work schedule review *Can you confirm your finish times on each occasion please?*

Doctor agreement
After their review, your supervisor has recommended the outcome to be **compensation & work schedule review**.

To raise a new exception, click **create new exception** from your dashboard.

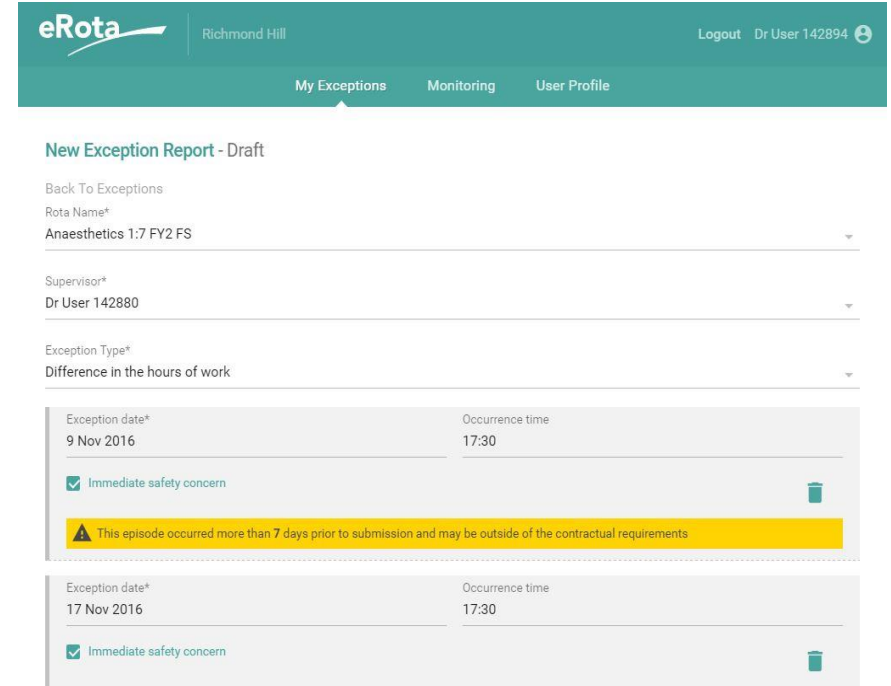
Rota name: the name of your current rota (as defined by your medical staffing department in eRota; it may be displayed on your personalised work schedule).

Supervisor: the name of the person delegated to undertake the initial and work schedule level 1 reviews for you. This may be a clinical or educational supervisor.

Exception type: whether your exception relates to a difference in hours, difference in pattern of hours or education and training opportunities. A single exception report can only contain episodes relating to one type.

Exception date: the date on which the episode occurred. You will be notified on screen if the date falls outside of the contractual time limits for submission but you will still be to submit the exception regardless.

Occurrence time: the approximate start time of the exception episode. This can be left at 00:00 if a start time is not appropriate for the episode.



eRota | Richmond Hill | Logout | Dr User 142894

My Exceptions | Monitoring | User Profile

New Exception Report - Draft

[Back To Exceptions](#)

Rota Name*
Anaesthetics 1:7 FY2 FS

Supervisor*
Dr User 142880

Exception Type*
Difference in the hours of work

Exception date*	Occurrence time
9 Nov 2016	17:30
<input checked="" type="checkbox"/> Immediate safety concern	
⚠ This episode occurred more than 7 days prior to submission and may be outside of the contractual requirements	
17 Nov 2016	17:30
<input checked="" type="checkbox"/> Immediate safety concern	

Immediate safety concern: enables you to flag whether you feel the episode resulted in a safety concern that affected yourself or patients.

Variance from work schedule: enables you to define in more detail how your exception episodes differ from your planned work schedule. For example, you may wish to define your normal start and finish times to illustrate how your hours have increased.

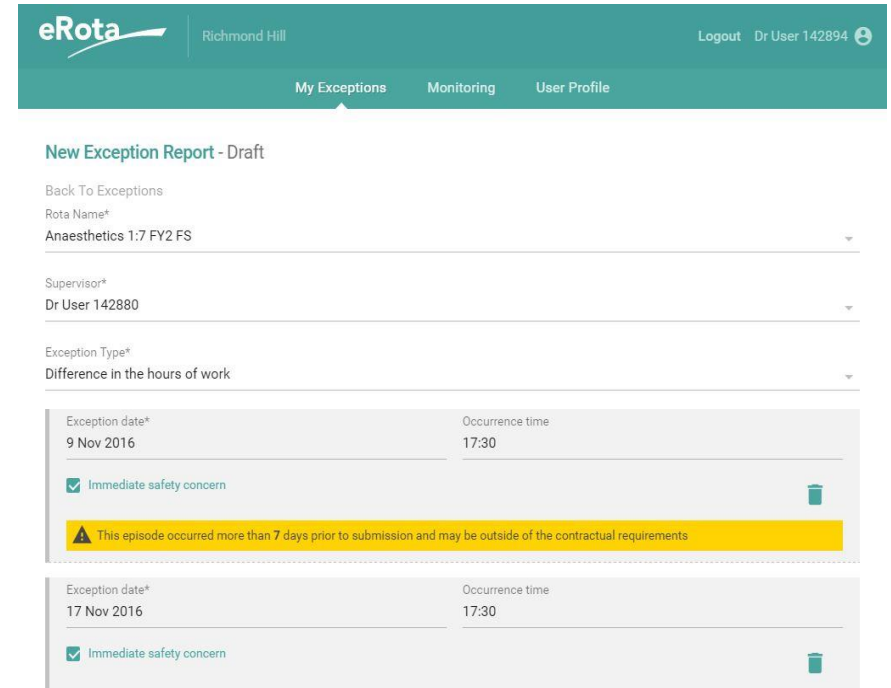
Steps taken to resolve matters prior to escalation: enables you to record any conversations that may have taken place between yourself and a manager or other colleagues before recording the exception.

Action buttons:

Submit: saves your exception and notifies the named supervisor, your organisation’s administrators and guardian of safe working. Your director of medical education will also be notified if the exception type relates to education or training.

Save: saves your exception in a draft state for later submission.

Cancel: deletes your date and returns you to the dashboard.



eRota | Richmond Hill | Logout | Dr User 142894

My Exceptions | Monitoring | User Profile

New Exception Report - Draft

Back To Exceptions

Rota Name*
Anaesthetics 1:7 FY2 FS

Supervisor*
Dr User 142880

Exception Type*
Difference in the hours of work

Exception date*	Occurrence time
9 Nov 2016	17:30
<input checked="" type="checkbox"/> Immediate safety concern	
⚠ This episode occurred more than 7 days prior to submission and may be outside of the contractual requirements	
17 Nov 2016	17:30
<input checked="" type="checkbox"/> Immediate safety concern	

After submission your named supervisor will make an initial review of your exception report. Often this review will be carried out face-to-face and they will update the report with their initial review notes and any relevant attachments.

When an initial review decision has been made, you will receive an automated notification asking you to login and either agree or disagree with that decision; this should take place within 14 days. Your disagreement will mean that the work schedule moves to a level 1 work schedule review stage.

Occasionally, your supervisor may request additional information or clarity in your original submission. If so, you will receive an automated notification asking you to login. In this scenario, you will be able to fully edit the report to make the required changes before re-submitting.

Doctor agreement


After their review, your supervisor has recommended the outcome to be **compensation & work schedule review**.

Do you:

- Agree
- Disagree

Please note that on submit, your work schedule will be moved to the level 1 work schedule review stage.

 CANCEL

 SUBMIT