



HealthRoster

HealthMedics

HealthAssure

# Reporting by Exception

Quick guide for supervisors

December 2016

V1.2

Private & Confidential footer goes here



**EXAMPLE**  
A GREAT COMPANY

- Account Setup
  - Receiving login details
  - Setting password
  
- Dashboard
- Viewing reports
- Reviewing/Deciding an outcome Initial Review
- Reviewing/Deciding an outcome Stage 1 Work Schedule

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

 Your Username

Password

 Your 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.

If you already use one of our other HealthMedics products, your supervisor role will have been added to your existing account. You may be presented with a product selection screen as shown on the right; exception reporting forms part of the Junior Doctor Portal.

### 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)

**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: \*

### 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

### Select Product

> Junior Doctor Portal

> Consultant Portal

Sign in with a different ID

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The dashboard will list all of the exception reports that have been raised with you listed as the supervisor. The dashboard will display key information such as the submitted date, doctor name and the current stage of the report. In addition, you will see the number of remaining days until the next decision needs to be made (by the organisation or the doctor) and the whether the report was linked to an immediate safety concern (ISC) for the doctor or patients.

Use the key metrics above the dashboard to filter your list by either total exceptions, those overdue or those requiring an action on your part.

In addition to the dashboard, you will also receive automated notifications by email each time a new exception is raised. As a named supervisor, you will responsibility for the initial review and level 1 work schedule review decisions.

The screenshot shows the eRota dashboard interface. At the top, there is a header with the eRota logo, the location 'Richmond Hill', and a user profile section for 'Dr User 142880' with a 'Logout' button. Below the header, there are navigation tabs for 'Supervisor' and 'User Profile'. The main content area is titled 'Exception reports for review' and features three large metric cards: '13 Exceptions in total', '8 Overdue', and '6 Action required'. A 'DOWNLOAD TRUST POLICY' link is also present. Below these metrics is a table listing individual 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 09:58	-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
10 Nov 2016 09:36		User 142894	u14289101116_1		Anaesthetics 1:7...	Dr User 142880	Hours	Initial Review	Unresolved	Compensation: Overtime payment
10 Oct 2016 11:42		Hannah Kennedy	hkenne101016_1	▲	Rota 1 (NWD only...	Dr Adriana Appleby	Hours	Level 1	Unresolved	Prospective Changes

Click an individual report row on the dashboard to view the submitted report details and initial review form.

The initial review form enables you to detail summary information from your face-to-face meeting with the doctor, as well as make an initial outcome decision. Ensure that you provide as much detail as possible; information entered here may be used as evidence to support future decisions if the exception moves further through the workflow. The attachment area can be used to add external documentation to the review, such as meeting minutes or a revised work schedule.

In cases where you feel there is insufficient information to make a reasonable initial review decision at this stage, you can use the 'request for more info' option in the review meeting outcome options to send the report back to the doctor for more clarity. You will need to provide a reason to support your request for more information.

If you select any of the other decision options such as no further action or compensation, the doctor will be request to agree or disagree with the decision by logging in. They will receive an automated notification as soon as you submit your initial review.

## Exception Report — Dr Winston Smith

Reference code  
wsmith041016\_1

Rota name  
T&O Junior (2016)

Supervisor  
Dr Francis Fitzgerald

Exception submitted on  
04 Oct 2016 12:21

Exception episodes  
3 October 2016 00:00  
Difference in the hours of work

Variance from the work schedule  
Unable to finish on time as I wasn't able to conduct a formal handover

Steps taken to resolve matters prior to escalation  
Spoke with the rota coordinator

**INITIAL REVIEW** LEVEL 1 LEVEL 2 FINAL

**Initial review — Pending**

Review meeting date Review meeting time  
17:08

Review meeting attendees 0/5000

Review meeting notes 0/5000

Drop attachment files here, or click to select files to upload.

No further action 0/5000

Compensation: Time off in lieu

Compensation: Overtime payment click to select files to upload.

Compensation & work schedule review

Work schedule review

Request for more info

✕ CANCEL
➤ SUBMIT

Doctor disagreement with your initial review outcome decision will lead to the report automatically moving to a level 1 work schedule review.

The level 1 work schedule review mirrors the form you will have used for the initial review, however the review meeting outcome decisions are slightly different. Rather than make a new decision, you may find it more appropriate to uphold the initial decision. For any other decision, the doctor will be asked to agree or disagree.

Doctor disagreement with a level 2 decision will lead to the exception report automatically moving a level 2 work schedule review. Level 2 and final work schedule reviews are carried out by the Guardian of Safe Working or an administrator. In cases where the exception is related to education or training, the Director of Medical Education can also complete these stages. These roles are automatically notified when the exception report moves to level 2.

INITIAL REVIEW **LEVEL 1** LEVEL 2 FINAL

## Review – Pending

Review meeting date Review meeting time  
16:12

Review meeting attendees 0/5000

Review meeting notes 0/5000

Drop attachment files here, or click to select files to upload.

### Review meeting outcome

- Initial decision upheld
- Combined review outcomes
  - Prospective changes to work schedule
  - Compensation or time off in lieu
  - Organisation changes