



Reporting by Exception

Quick Guide for Supervisors

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Login

- Once your account has been setup by your System Administration you will receive an email from “No Reply HealthMedics” detailing your unique Username & a temporary password.
- Select the link shown within 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 or alternatively save the link as a Favourite or Bookmark on a computer.
- Enter the login details exactly as they appear in the email. Ensure that no blank spaces appear at the end of your credentials if using the Copy & Paste function and click “**Login**”.

HealthMedics


Login Details

Username
Your Username

Password
Your Password

Remember me Login

[Forgotten your username/password?](#)

Allocate Software  Need help logging in? [Click here](#)
Allocate Security and Privacy Policy [Learn more](#)

User Account Setup

- If this is the first time you have used the system, you will be requested to check and update your personal details.
- Your name, work email address and GMC/GDC number (where applicable) may have been pre-populated by your local System Administrator.
- The remaining fields are non-mandatory and can be updated at a later stage. If you choose to add a secondary or personal email address, all automated system notifications will be sent to both email addresses.
- If you already use one of our other HealthMedics products, your Supervisor role may have been added to your existing account if applicable. You may be presented with a product selection screen as shown on the right; Exception Reporting forms part of the Junior Doctor Portal.
- Enter your new Password and select “Save”

Update Your Personal Details **Help & Support:**

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

Allocate Software PLC
1 Church Road
Richmond
TW9 2QU
Phone: 0844 4179512
Fax: 0844 4179512
E-mail: info@allocatesoftware.com
Web: www.allocatesoftware.com

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: *

Select Product

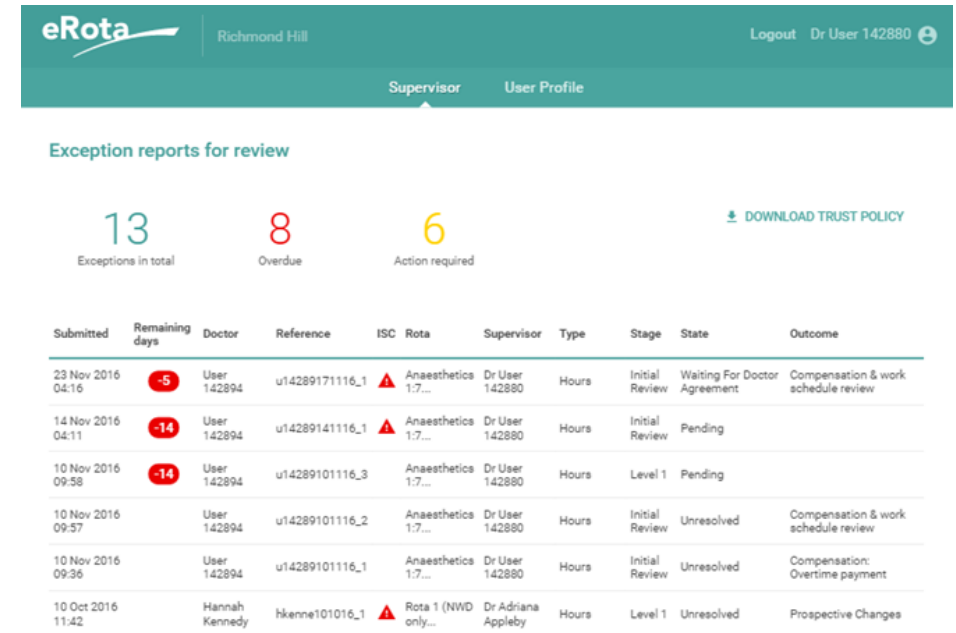
Sign in with a different ID

Help & Support

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E-mail: info@allocatesoftware.com
Web: www.allocatesoftware.com

Dashboard

- 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 if 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 be responsible for the Initial Review and Level 1 Work Schedule Review decisions.
- Click on any of the rows in the dashboard to view the individual Exception Report details.



Initial Review

- 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 relevant 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, you can use the “Request for more info” option in the review meeting outcome options to return the report 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 requested to login to review & then Agree or Disagree with the decision. 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

Compensation & work schedule review

Work schedule review

Request for more info

CANCEL SUBMIT

Level 1 Work Schedule Review

- 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. Instead of making a new decision, you may find it more appropriate to uphold the initial decision. The doctor will be asked again to login for review & Agree or Disagree.
- Doctor disagreement with a Level 1 decision will lead to the Exception Report automatically moving to a Level 2 Work Schedule Review. Level 2 and Final Work Schedule Reviews are carried out by the Guardian of Safe Working or a nominated 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
