

Job-plan review, disagreement, mediation and appeal

Prepare for annual review, document unresolved issues and use the correct contractual route without personalising the dispute.

- ✓ 18 min reading
- ✓ Full teaching, practical next steps and reflection
- ✓ Six practice questions with answers and explanations
- ✓ Complete source list and jurisdiction notes

Prepared for SAS, locally employed and other UK doctors

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Using this module

Independent education

This is general professional information, not individual clinical, legal, employment, immigration, regulatory, tax or pensions advice. Current official instructions and the circumstances of the individual case remain controlling. Practice scores do not establish professional competence or accreditation.

The short answer

A job-plan disagreement is best handled as a defined professional and contractual problem. Identify the disputed activity, time, classification, objective or resource; show the evidence; propose alternatives; and follow the review, mediation and appeal process in the applicable terms. Deadlines and panel arrangements vary, so check the live contract immediately.

Three next actions

- Write a one-page schedule of agreed and disputed points with evidence.
- Check the exact local and national review, mediation and appeal procedure and deadlines.
- Seek BMA or union advice before submitting a formal appeal.

Learning objectives

- Conduct an evidence-led annual review.
- Distinguish informal problem-solving, mediation and appeal.
- Prepare a concise formal case.

Annual review and interim review

Job plans should be reviewed regularly and when duties, service configuration, health, working pattern or responsibilities materially change. The review should examine activity, objectives, resources, workload evidence and prospective changes—not simply roll the previous document forward.

Request an interim review when waiting for the annual cycle would leave a material mismatch. State the change, effect and proposed review agenda. Keep appraisal separate: appraisal supports professional development and revalidation; it is not the contractual forum for settling job-plan allocation.

- Review when work changes materially.
- Use job planning rather than appraisal for allocation disputes.
- Bring evidence and options.

Define the disputed point

Break broad disagreement into answerable questions: Is the activity required? How often? How long? Which category? Is it in premium time? What administration and travel accompany it? Which objective and resource depend on it? This prevents several issues being collapsed into a single argument about attitude.

Create a table with employer proposal, doctor proposal, evidence, consequence and possible compromise. Confirm matters already agreed so the formal process focuses only on what remains.

- Use one row per issue.
- State evidence and consequence.
- Preserve agreements.

Informal resolution

Many disagreements can be resolved by checking data, definitions and service assumptions before escalation. Meet with the clinical manager, share the issue schedule and ask what outcome or constraint drives the employer proposal. Consider a time-limited trial with defined data and review.

Informal resolution should not be endless. Record the meeting and move to the contractual route when the dispute remains or deadlines approach. Do not allow a request for further discussion to extinguish a formal right.

- Understand the underlying constraint.
- Use time-limited trials carefully.
- Protect contractual deadlines.

Mediation

Contractual mediation is intended to help the parties reach agreement, often with involvement from a senior medical manager or other defined person. It is not counselling and may not determine legal rights. Prepare a concise bundle and know the outcome sought.

Ask who will mediate, whether they are independent of the original decision, what documents will be considered and how the outcome is recorded. Take representation where permitted and helpful.

- Check the contractual process.
- Use a concise bundle.
- Clarify authority and outcome.

Formal appeal

An appeal should identify the contractual provision, decision challenged, facts, evidence and remedy sought. Follow the form, recipient and deadline in the applicable terms. A large undifferentiated evidence dump makes the case harder to assess.

Keep legal, equality or whistleblowing issues distinct where they arise and obtain individual advice; a job-plan appeal may not determine every employment question. If health or disability affects the dispute, consider a reasonable-adjustment request alongside—not hidden inside—the job-plan case.

- Follow form and deadline exactly.
- Ask for a defined remedy.
- Separate parallel legal or equality routes.

After the outcome

Implement the agreed or determined plan and confirm start date, payment, backdating where applicable, objectives and review. Monitor whether it works. An appeal result does not remove the need for local operational implementation.

If the issue remains, obtain advice on contractual enforcement, grievance or other routes. Do not repeatedly relitigate the same point without identifying new evidence or a material change. Continue to raise immediate patient-safety concerns through the appropriate route.

- Confirm implementation in writing.
- Check payroll and rota changes.
- Review the real-world effect.

Common mistake

Avoid this

Turning an allocation dispute into a judgment about personal worth. A panel can decide a defined contractual issue more reliably than a broad narrative about recognition.

Pause and reflect

Could an independent reader identify your exact disputed point and requested remedy from one page?

Takeaways

- Review job plans when work changes, not only annually.
- Protect deadlines while trying informal resolution.
- Formal cases need a contractual basis, focused evidence and a precise remedy.

Knowledge check

Choose one best answer. These practice questions support reflection; they do not assess a real case or confer accreditation. Answer positions match the browser edition.

1. A new service adds weekly recurring duties mid-year. What is appropriate?

- A. Wait silently for appraisal
- B. Request an interim job-plan review
- C. Change the signed plan personally
- D. Assume no time is needed

2. Which appeal issue is clearest?

- A. 'I deserve more time.'
- B. 'Twenty-six annual clinics require 156 hours including documented administration; the plan allocates 104.'
- C. 'Several colleagues use a different allocation, although I have not compared their terms.'
- D. 'The plan is insulting.'

3. When is a trial arrangement useful?

- A. When no data will be collected
- B. When scope, duration, measures and review date are written
- C. When it permanently waives rights
- D. When the doctor must remain indefinitely available

4. What should a doctor establish before mediation?

- A. That the mediator can impose the doctor's preferred job plan without checking the procedure
- B. Only the room location
- C. That no written record is needed
- D. Who conducts it, what authority they have, documents, representation and timescale

5. What strengthens a formal appeal?

- A. Missing the deadline
- B. A structured issue, contractual basis, evidence and requested remedy
- C. Every email ever received
- D. Allegations about motive without evidence

6. An appeal awards additional job-planned time. What next?

- A. Confirm implementation, effective date, rota and payroll consequences
- B. Wait a year to check
- C. Assume payroll will infer everything
- D. Close the file without confirming the revised plan and implementation details

Answers and explanations

1. B — Request an interim job-plan review

Request an interim job-plan review This applies the principle in “Annual review and interim review”.

Re-read “Annual review and interim review”, then identify the controlling document and the fact you would verify before acting.

2. B — ‘Twenty-six annual clinics require 156 hours including documented administration; the plan allocates 104.’

‘Twenty-six annual clinics require 156 hours including documented administration; the plan allocates 104.’ This applies the principle in “Define the disputed point”.

Re-read “Define the disputed point”, then identify the controlling document and the fact you would verify before acting.

3. B — When scope, duration, measures and review date are written

When scope, duration, measures and review date are written This applies the principle in “Informal resolution”.

Re-read “Informal resolution”, then identify the controlling document and the fact you would verify before acting.

4. D — Who conducts it, what authority they have, documents, representation and timescale

Who conducts it, what authority they have, documents, representation and timescale This applies the principle in “Mediation”.

Re-read “Mediation”, then identify the controlling document and the fact you would verify before acting.

5. B — A structured issue, contractual basis, evidence and requested remedy

A structured issue, contractual basis, evidence and requested remedy This applies the principle in “Formal appeal”.

Re-read “Formal appeal”, then identify the controlling document and the fact you would verify before acting.

6. A — Confirm implementation, effective date, rota and payroll consequences

Confirm implementation, effective date, rota and payroll consequences This applies the principle in “After the outcome”.

Re-read “After the outcome”, then identify the controlling document and the fact you would verify before acting.

Official and professional sources

Confirm the current source version and applicable nation, contract, scheme or specialty. A source list is not a statement that every rule applies to every reader.

NHS Employers: SAS 2021 terms, model contracts and resources

England · <https://www.nhsemployers.org/articles/terms-and-conditions-and-resources-sas-contract-2021>

NHS Wales Employers: SAS doctors resources

Wales · <https://thenhsalliance.org/resources/specialty-specialist-and-associate-specialist-sas-doctors-wales>

Department of Health NI: SAS 2021 contract documentation

Northern Ireland · <https://www.health-ni.gov.uk/publications/sas-2021-contract-documentation-and-guidance>

BMA: job-planning overview (read with your current national terms)

UK · <https://www.bma.org.uk/pay-and-contracts/job-planning/job-planning-process/an-overview-of-job-planning>

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