

# Back to Basics: Annual Leave

## 4. Annual Leave Notifications

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# Back to Basics Sessions



Managing Annual Leave Requests



Annual Leave Entitlements



Annual Leave Hours



**Annual Leave Notifications**



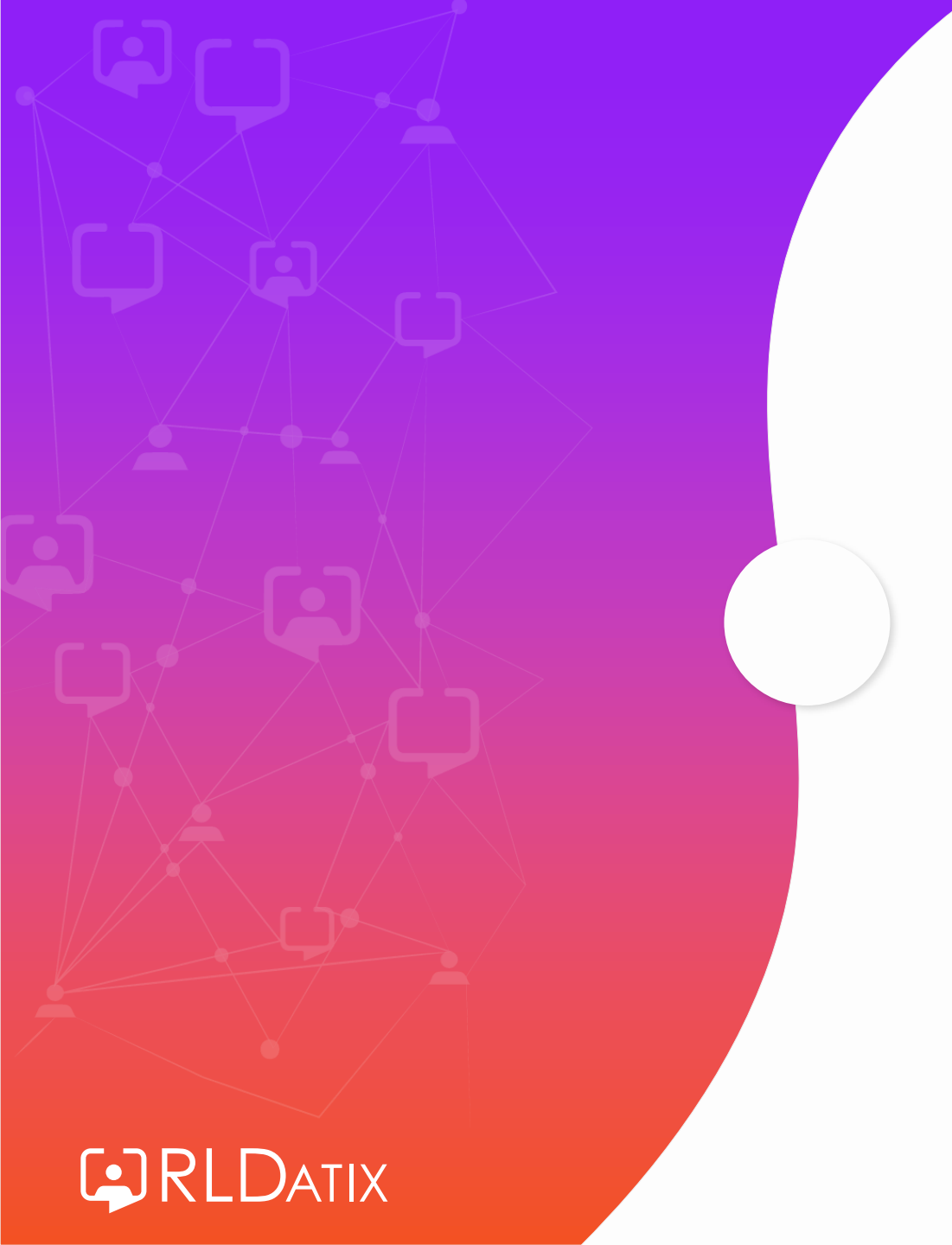
Annual Leave Rules

# Objective

To understand the basics of how notifications work and to understand the key notifications that you will want to consider when managing annual leave.

# Agenda

- Notification Templates
- Unavailability Notifications
- Notification Log
- Supporting Documentation



# Notification Templates

# Reference Data > Notifications > Notification Templates

Ref Data Tools: Notifications

Ref Data Actions: Notifications

Organisation ▾ Payroll ▾ Person ▾ Unavailability ▾ Rostering ▾ Temporary Staffing ▾ SafeCare ▾ Attendance ▾ Location ▾

[Rostering](#)
[SafeCare](#)
[Personnel](#)
[Payroll](#)
[Admin](#)
[Gateway](#)
[Reference Data](#)

### Notifications & Templates

Name ↓	Type	Recipient	Primary Entity	Template
Urgent Bank Shift required.	Manual	Employee	Posting	SMS Test_blank.txt
Upcoming Training Days Advanced Notice	Study Day Advanced Notice	Employee	Unavailability	Study Day Advanced Notice
UnavailabilityRequestSubmittedToFullApprover	New Unavailability Request	Full Approver	Unavailability	LeaveRequestSubmittedToFullApprover
UnavailabilityRequestSubmitted	New Unavailability Request	Team Manager	Unavailability	LeaveRequestSubmitted
UnavailabilityRequestRejected	Denied Unavailability Request	Employee	Unavailability	LeaveRequestRejected
UnavailabilityRequestApproved	Approved Unavailability Request	Employee	Unavailability	LeaveRequestApproved
Timesheet Exception Rejected - Unavailability	Timesheet Exception Rejection	Employee	Unavailability	Timesheet Exception Rejected - Unavailability
Timesheet Exception Rejected - Duty Assignment	Timesheet Exception Rejection	Employee	Duty Assignment	Timesheet Exception Rejected - Duty Assignment
Time owing above limit	Manual	Employee	Posting	Time owing above limit
Swap Request Expired to Requestor	Swap Request Expired	Owner	Swap Request	SwapRequestExpiredToRequestor
Swap Request Expired to Receiver	Swap Request Expired	Employee	Swap Request	SwapRequestExpiredToReceiver
Swap Request Denied to Requestor	Swap Request Denied	Owner	Swap Candidate	SwapRequestDeniedToRequestor
Swap Request Denied to Receiver	Swap Request Denied	Employee	Swap Candidate	SwapRequestDeniedToReceiver
Swap Request Declined	Swap Request Declined	Employee	Swap Candidate	Swap Request Declined
Swap Request Cancelled	Swap Request Cancelled	Employee	Swap Candidate	Swap Request Cancelled
Swap Request Auto Declined	Swap Request Auto Declined	Owner	Swap Request	Swap Request Declined
Swap Request Approved to Requestor	Swap Request Approved	Owner	Swap Candidate	SwapRequestApprovedToRequestor
Swap Request Approved to Receiver	Swap Request Approved	Employee	Swap Candidate	SwapRequestApprovedToReceiver
Swap Request Accepted	Swap Request Accepted	Employee	Swap Candidate	Swap Request Accepted
Swap Candidate Auto Declined	Swap Candidate Auto Declined	Employee	Swap Candidate	Swap Request Declined
SuspendedUserResetPassword	Suspended User Reset Password	Employee	User Account	SuspendedUserResetPassword

**Notifications**

- [Change Template](#)
- [Revert To Stock Template](#)
- [More](#)

Change Notification
Manage Org Unit Restriction

**Notification Details**

Name  
UnavailabilityRequestApproved

Primary Entity: Unavailability ▾ Recipient: Employee ▾

Fixed Address: \_\_\_\_\_ Fixed Telephone Number: \_\_\_\_\_

CC: \_\_\_\_\_

Enabled  SMS Can Have Response

**Notification Template Details**

**Send Options**

Send Sms By Default  Send Email By Default

Send to Loop by default  Send SMS for Non Loop Users

**SMS Template**

Editable (When triggered manually)

SMS Message

Clear
Save

Notification Details

Name

UnavailabilityRequestSubmitted

Primary Entity

Unavailability



Recipient

Team Manager



Fixed Address

Fixed Telephone Number

CC



Enabled



SMS Can Have Response

Primary Entity  
Unavailability

Fixed Address

CC

Enabled

### Notification Template Details

Send Options

Recipient  
Team Manager

- Employee
- Fixed Address
- Full Approver
- Manager
- Partial Approver
- Team Manager

Recipient	Description
Employee	The person assigned to the duty/unavailability/person/pattern etc.
Manager	The first approver of the associated roster
Team Manager	The manager of the team set up in the unit
Fixed Address	Specific email address or telephone number
Full Approver	Nominated second approver on the demand template
Partial Approver	Nominated first approver on the demand template
Request Creator	Bank / Agency request creator
Owner	Flag owner (Safecare)
Initiator	The person who triggers the notification (e.g. send to yourself)



# Copy Notification

The screenshot shows a user interface for managing notifications. At the top, there is a header 'Notifications & Templates' with a close button (X) in the top right corner. Below the header, the main section is titled 'Notifications'. On the right side of this section, there is a vertical menu with three items: 'Change Template' (with a cloud icon), 'Revert To Stock Template' (with a circular arrow icon), and 'More' (with a three-dot icon). The 'More' option is highlighted with a blue border. Below this menu, a dark grey dropdown menu is open, showing two options: 'Download Template' (with a download icon) and 'Copy Notification' (with a copy icon). The 'Copy Notification' option is highlighted with a red border. At the bottom of the interface, there are two buttons: 'Change Notification' (dark grey) and 'Notification Details' (teal).

Change Notification
Manage Org Unit Restriction

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**Notification Details**

**Name**  
UnavailabilityRequestApproved

---

**Primary Entity**  
Unavailability

**Recipient**  
Employee

---

**Fixed Address**

**Fixed Telephone Number**

---

**CC**

---

Enabled

SMS Can Have Response

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**Notification Template Details**

**Send Options**

Send Sms By Default

Send Email By Default

Send to Loop by default

Send SMS for Non Loop Users

**SMS Template**

Editable (When triggered manually)

**SMS Message**

---

Clear
Save

Send to Loop by default

Send SMS for Non Loop Users

**SMS Template**

Editable (When triggered manually)

**SMS Message**

---

Preview

**Loop Template**

Editable (When triggered manually)

**Loop Message \***

I've requested leave on EOL. I need it approved please...

Test for push notification

---

Preview

**Email Template**

**Name**  
LeaveRequestSubmitted

**Subject**  
HealthRoster Leave Request Submitted

---

Clear
Save

Notifications & Templates

## Notifications

- Change Template
- Revert To Stock Template
- More
- Download Template**
- Copy Notification

Change Notification

Notification Details

```
*LeaveRequestSubmitted - Notepad
File Edit Format View Help

<head>
  <title></title>
</head>
<body>
  <div style="font-family: sans-serif;font-size:10.0pt;">
    <p>Hello,</p>
    <p>You have a new leave request pending in HealthRoster.</p>
    <p>${Person.Forenames} ${Person.Surname} is requesting leave on ${DateRange}.</p>
    <p>Please log in to HealthRoster to view the request.</p>
    Thank you,<br />
    The HealthRoster Team<br />
    <br />
    
  </div>
</body>
</html>
```

### Note

Do not change the sections of the template that contain code (text or items contained in the <> or \${}) as this would affect the information displayed when the email is sent.

Notifications & Templates

## Notifications

- Change Template
- Revert To Stock Template
- More

Notifications & Templates

## Notifications

### Change Template

Template \*

LeaveRequestSubmitted.txt

Notification Preview

Hello,

You have a new leave request pending in HealthRoster.

Sarah Harper is requesting leave on 13-17 Apr.

Please log in to HealthRoster to view the request.

Thank you,  
The HealthRoster Team

Change Notification | Manage Org Unit Restriction

Preview

### Email Template

Name  
LeaveRequestSubmitted.txt

Subject  
HealthRoster Leave Request Submitted

Preview

Body

Hello,

You have a new leave request pending in HealthRoster.

\${Person.Forenames} \${Person.Surname} is requesting leave on \${DateRange}.

Please log in to HealthRoster to view the request.

Thank you,  
The HealthRoster Team

Preview

Clear Save

# Manage Org Restriction

Change Notification **Manage Org Unit Restriction**

Unit Restriction (leave blank for unrestricted)

**+ Assign Units** Remove Units

Short Title ↑	Full Title	Code
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Unit Restriction (leave blank for unrestricted)

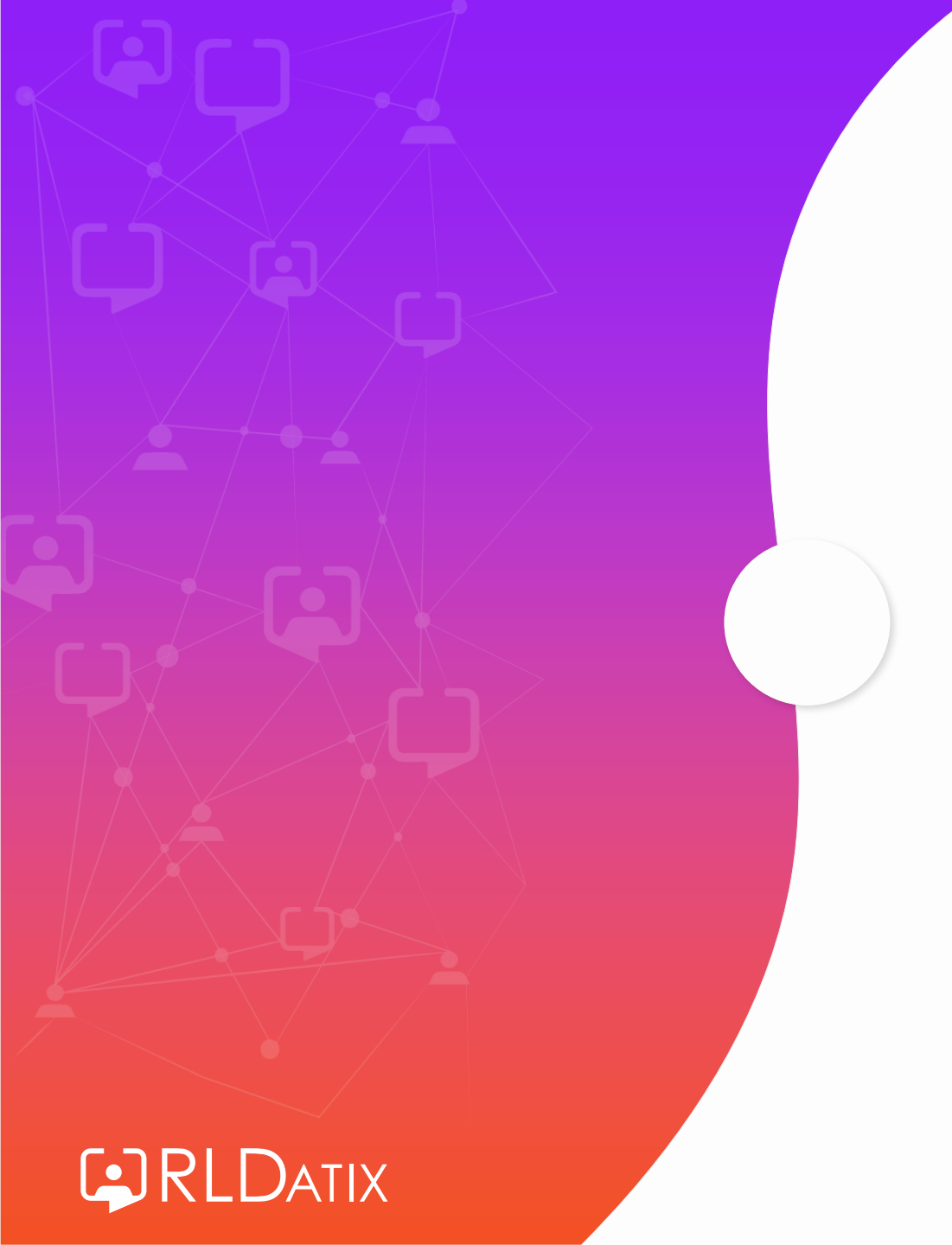
**Not Assigned**

Short Title ↑	Code	Path
Claremont Surgery		ASW Tr
Clarence MC		ASW Tr
CloudStaff Loop	CloudStaff	Loop Tr
Colorectal		ASW Tr
Community	WH135	ASW Tr
Community Doctors		ASW Tr
Community Services		ASW Tr
Complex Care		ASW Tr
Complex Rostering		ASW Tr
Corporate Services		ASW Tr
Critical Care		ASW Tr
CSNP		ASW Tr
Cytology		ASW Tr
Darby Ward		ASW Tr
Day Surgery		ASW Tr
Dedworth Medical Centre		ASW Tr
Dental Hospital		ASW Tr
DENTAL MAXILLOFACIAL		ASW Tr
Diabetes and Endocrinology		ASW Tr
Diagnostics		ASW Tr

**Assigned**

Short Title ↑	Code	Pa
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Cancel OK



# Unavailability Notifications

# Unavailability Request Submitted

- Sent to the set recipient when an employee requests an unavailability
- Notification will send to recipient (e.g First Approver)
- Anyone with feature access *Unavailability Actions: Approve and Reject*, and the visible unit will be able to approve
- Common Recipient is Team Manager, First Approver or Second Approver

### Notification Details

Name  
UnavailabilityRequestSubmitted

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Primary Entity Unavailability	▼	Recipient Team Manager	▼
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Fixed Address		Fixed Telephone Number	
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CC

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Enabled  SMS Can Have Response

# Unavailability Request Approved

- Sent to employee when unavailability request is approved
- Approval requires *Unavailability Actions: Approve and Reject* and visible unit
- Recommended recipient: Employee

### Notification Details

Name  
UnavailabilityRequestApproved

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Primary Entity Unavailability	▼	Recipient Employee	▼
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Fixed Address	Fixed Telephone Number
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CC

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Enabled  SMS Can Have Response



# Unavailability Request Rejected

- Sent when unavailability request is rejected
- Rejection requires *Unavailability Actions: Approve and Reject* and visible unit
- Recommended recipient: Employee

### Notification Details

**Name**  
UnavailabilityRequestRejected

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**Primary Entity**  
Unavailability ▼

**Recipient**  
Employee ▼

---

**Fixed Address**

**Fixed Telephone Number**

---

**CC**

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Enabled  SMS Can Have Response

# Cancelled Approved Unavailability Request

- Sent when employee cancels approved unavailability request
- Employee requires *Employee Online: Can Cancel Approved Unavailabilities*
- Common Recipient is Team Manager, First Approver or Second Approver

### Notification Details

Name  
Cancelled Approved Unavailability

Primary Entity  
Unavailability

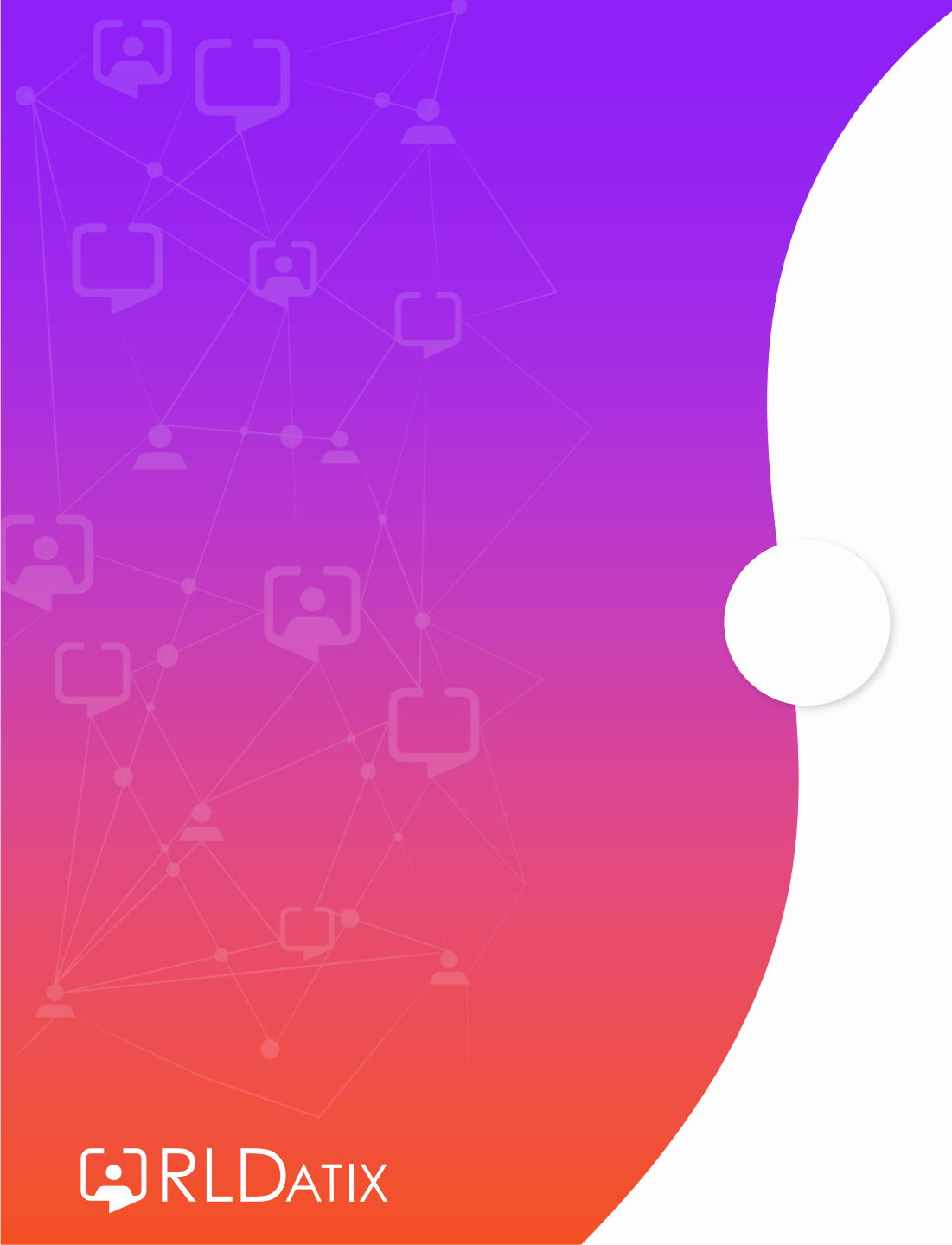
Recipient  
Team Manager

Fixed Address

Fixed Telephone Number

CC

Enabled  SMS Can Have Response



# Notification Log

Admin>Logs>Notification Log

*Ref Data Actions: Notifications*

*Ref Data Tools: Notifications*

Admin>Logs> SMS Notification Log

*Ref Data Tools: SMS Notification Log*

Notification Log 8 Records

Notification: Any Date Type \* Requested At To  
Status: Any From \* 14/12/2022 Recipient  
Notification Method: Any To \* 14/12/2022 Sender  
Inbound Message Response: Any

Requested At	Status	Sent At	Name	Type	Recipient	Template	To
14/12/2022 13:29	Sent	14/12/2022 13:29	UnavailabilityRequestSubmitted	New Unavailability Request	Tabatha Pemple (999999999)	LeaveRequestSubmitted.txt	hollie

# Supporting Documents

- HealthRoster 11 – Notifications Feature Guide.pdf

<https://www.allocate.support/hc/en-us/articles/441592142882>



**Questions?**



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