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## mySchedule Manager Guide - How to Configure EARL Notifications and Call Transfers Numbers

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### Introduction

This guide covers default notification settings as well as how to customize email notifications and call transfer settings in mySchedule EARL.

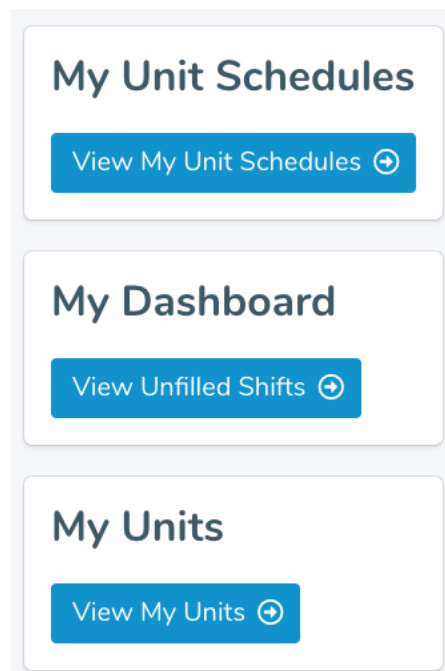
Note: When employees call into mySchedule to report an absence, mySchedule will indicate they have reached “Quick Dial”. mySchedule Quick Dial lets employees send information to mySchedule through the phone. Employees will report an absence by calling mySchedule Quick Dial and selecting option 1, the Employee Absent Reporting Line (EARL).

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### Accessing Notification Settings

Unit Notification settings for your areas can be accessed in two different ways:

1. On the mySchedule front page, select the **My Units** button near the bottom of the page:



2. From the **Search** menu in mySchedule and selecting **My Units**:

Search ▾

My Units

Employees

Vacation Mapping

3. From the **My Units** page, select the **Notification Rules** button for the unit you want to review or edit:

## Units

You have Manager access on the following 2 units.

Facility	Unit		
700 - NHR NHA Regional	700 - NHR HIMS C&DataAnalysis UHN	<a href="#">Unit Details</a>	<a href="#">Notification Rules</a>
700 - NHR NHA Regional	700 - NHR HIMS Coding & Analytics	<a href="#">Unit Details</a>	<a href="#">Notification Rules</a>

## Unit Notification Rules

The **Unit Notification Rules** page has five sections:

1. **Unit Summary**
2. **Default Rules**
3. **Configured Rules**
4. **Call Transfer Rules**
5. **Fallback Information**

### Unit Notification Rules

132 - PEV Food Services

Manager Incumbent: SARAH SMITH (00000)  
Manager Position Number: 000111

Default Rules ?

Event Type ALL	Positions Manager	Schedule Any Day: Any Time Include Stat Holidays	Manager's Manager JANE DOE	<input type="checkbox"/> Delete <input type="checkbox"/> Edit
Event Type ALL	Positions ALL (Excludes Manager)		Manager JOHN SMITH Delegate (User) LISA NAME	

Configured Rules ?

[+ New Routing Rule](#)

Call Transfer Rules ?

Schedule Monday: 08:00 - 18:00 Tuesday: 08:00 - 18:00 Wednesday: 08:00 - 18:00 Thursday: 08:00 - 18:00 Friday: 08:00 - 18:00 Include Stat Holidays	Phone Number (000) 000-0000	<input type="checkbox"/> Delete <input type="checkbox"/> Edit
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[+ New Call Transfer Rule](#)

Manager's Manager	JIM SMITH (00000)
Fallback Email *	fallbackexample@northernhealth.ca
Unit Scheduling Team	Fort St. John - North Peace 3

\* The fallback email will only be contacted if the unit has no delegates, manager, or manager's manager.

## 1. Unit Summary

### Unit Notification Rules

132 - PEV Food Services

Manager Incumbent: SARAH SMITH (00000)  
Manager Position Number: 000111

This section includes the name of the unit, the current manager (this will indicate the position is vacant if the regular unit manager position is vacant), and the manager’s position number.

## 2. Default Rules

There are two default rules set automatically for each unit, which will be used to route EARL notifications, if no Configured Rule (see below) have been set for the unit. Basically a safety measure to ensure EARL notifications are routed to someone, if no Configured Rules are setup.

- a. The first rule involves the Manager position. If the manager’s position is located in the same ESP unit or Procura department as their employees, this rule will direct EARL email notifications and automatically provide unit access to that Manager’s Manager.

If the Manager’s position is not located in this unit, this rule will be visible, but inactive.

- b. The second rule involves all non-Manager positions in the unit. By default, the unit manager and anyone who has been assigned Delegate access to the unit will receive EARL email notifications.

If the Manager position is vacant, EARLs will be automatically routed to any Delegates for the unit. If there is no manager or delegates for the unit, the Manager’s Manager will receive all notifications.

Default Rules ?

Event Type ALL	Positions Manager	
Schedule Any Day: Any Time Include Stat Holidays	▶	Manager's Manager JANE DOE

Event Type ALL	Positions ALL (Excludes Manager)			
Schedule Any Day: Any Time Include Stat Holidays	▶	<table border="1"> <tr> <td>Manager JOHN SMITH</td> <td>Delegate (User) LISA NAME</td> </tr> </table>	Manager JOHN SMITH	Delegate (User) LISA NAME
Manager JOHN SMITH	Delegate (User) LISA NAME			

## 3. Configured Rules

**Configured Rules** are customized routes where you can specify how notifications are handled based on position(s), day and time. Configured Rules override the default rules for the unit.


**IMPORTANT** – It is possible to set **Configured Rules** that exclude the unit manager, though a warning message will indicate this is the case while creating the rule.

- a. **Configured Rules** consist of:

<b>Event Type</b>	Currently not editable and displays “ALL” as EARLs are the only event types used at this time
<b>Positions</b>	Can select which positions in this unit this rule will apply to

<b>Schedule</b>	Can set the days and times for this rule
<b>Contacts</b>	Select the notification recipients (unit manager and delegates automatically added)

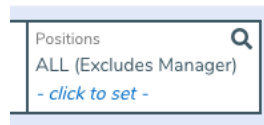
b. To create a new **Configured Rule**, select the **New Routing Rule** button:

Configured Rules 

Configured Rules are customizable routes where you can specify how notifications are handled based on position(s) and day/time. If you include/exclude a Manager or Delegate from a Configured Rule, it will include/exclude them from notifications regarding the selected positions at the selected times.

[+ New Routing Rule](#)

c. Select the **Positions** this rule will be applied to. The default is to apply the settings to all current and future positions excluding the manager. To edit the set of positions, select “click to set” to open the **Positions** overlay:



On the **Positions** overlay, you will see a listing of all of the positions assigned to this unit or department, including vacant positions. By default, the Unit Manager position will be excluded from the setting.

## Selecting Positions for New Rule

### Unit Manager Position

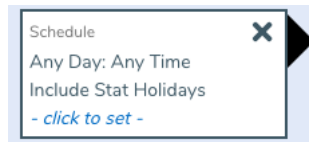
The manager position is assigned to another unit.

All current and future positions, except the manager position.

Position	Job Code	Title	Employees
<input type="checkbox"/> 013264	10001	10001-Cleaner	JANE EMPLOYEE
<input type="checkbox"/> 013265	10001	10001-Cleaner	LISA EMPLOYEE
<input type="checkbox"/> 013266	10001	10001-Cleaner	JIM SMITH
<input type="checkbox"/> 013267	10161	10161-Laundry Worker II	JOHN DOE

- i. The **Position** column lists the Position Control Number, or PCN. If the position is occupied, the job code, title, and employees will be listed. Vacant positions will also be listed as **Vacant Position**. Settings applied to vacant positions or positions that become vacant will be maintained when the positions are filled.
- ii. By default all positions are selected. To select specific positions, deselect the **“All current and future positions, except the manager position”** field, and select the positions you want to include in this setting.

- iii. Once you have selected the positions to include, select the **Confirm** button to save the list and return to the main page.
- d. Next set the **Schedule** for this route. By default, the **Schedule** will apply to all days and times. To edit select the “click to set” field.



This will open the **Schedule** overlay, where you can select days of the week and times of day for the routing to be in effect. The overlay has three sections:

- *Select Days* –allows you to select the days of the week in this schedule
- *Select Times* (not in the screenshot below) – allows you to select the times on each day
- *Review* – displays your selections in a visual format – the top of the box is midnight at the start of the day, and the bottom is midnight at the end of the day.

### Select Days ✕

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Every Day  
  Weekdays  
  Weekends

### Review

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Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
- 06:00 -	- 06:00 -	- 06:00 -	- 06:00 -	- 06:00 -	- 06:00 -	- 06:00 -
- 12:00 -	- 12:00 -	- 12:00 -	- 12:00 -	- 12:00 -	- 12:00 -	- 12:00 -
- 18:00 -	- 18:00 -	- 18:00 -	- 18:00 -	- 18:00 -	- 18:00 -	- 18:00 -

- Select “Every Day” to apply rule to all 7 days, Weekdays for Mon-Fri, and Weekends for Sat-Sun. You can also select specific days of the week if you need a different pattern of notifications. As you select days, they will highlight in blue. Note: You can only select consecutive days.

### Select Days ✕

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Every Day  
  Weekdays  
  Weekends

- Once you have selected your days, you can set the times that this schedule will be in effect. To apply these times to all days selected, make sure the Customise Per Day box is unchecked – this will display separate entry boxes for each selected days.
- To apply the setting to the full calendar day, set the time from 00:00-23:59.

- For weekends and weekdays, you can choose to include or exclude stat holidays in these settings – these cases will apply the settings in this specific routing on stat days – for example, if you have specialized weekend routings, you may want the same to occur on Monday or Friday stat holidays when you may not be at work.
- Times can also cross over midnight – for example, if you enter 18:00-06:00 on Friday, this will be in effect from 18:00 on Friday until 06:00 on Saturday morning. In these cases, you have the option to include Friday morning or exclude Saturday morning, if you want

Friday  -   Exclude Saturday Morning

Include Stat Holidays

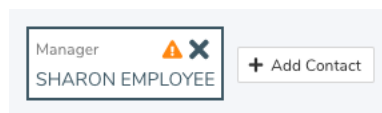
## Review

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
- 06:00 -	- 06:00 -	- 06:00 -	- 06:00 -	- 06:00 -	- 06:00 -	- 06:00 -
- 12:00 -	- 12:00 -	- 12:00 -	- 12:00 -	- 12:00 -	- 12:00 -	- 12:00 -
- 18:00 -	- 18:00 -	- 18:00 -	- 18:00 -	- 18:00 -	- 18:00 -	- 18:00 -

- Once the schedule displayed in the Review section appears correct, select Confirm to return to the previous screen.
- e. Next, select the recipients for this route in the **Contact** section. By default, the manager and any delegate for the unit will be included. Managers and delegates can be removed by selecting the **X** in the top-right corner:



To add additional recipients, select the **Add Contact** button:



The **Add Contact** overlay lists a variety of options – The Manager’s Manager is automatically included, as are any managers or delegates who have not been included in the rule. Click on a contact name to add them to the route.

It is also possible to add additional email recipients. To set an email recipient, simply type in the address and select **Add Email Contact**.

**Add Contact** [X]

Add Manager's Manager

JOHN

Add Manager

All managers are already included as contacts.

Add Delegate Position

JANE JOE SARAH

Add Delegate User

LISA

Add Email Address

example@example.com + Add Email Contact

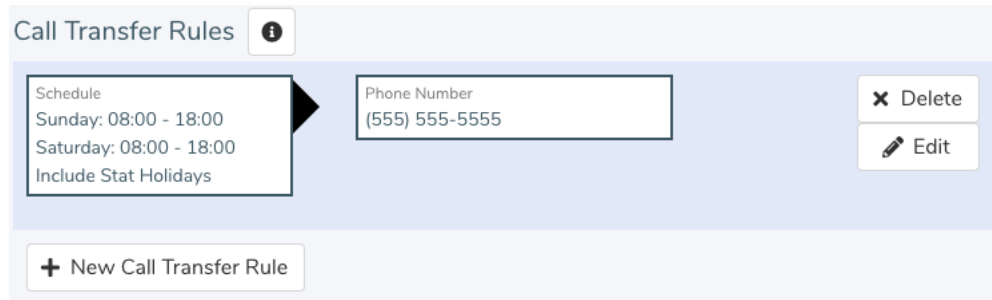
**IMPORTANT** – ESP Scheduling addresses no longer need to be included in order to receive EARLs. Procura Scheduling offices must be set as email recipients.

#### 4. Call Transfer Rules

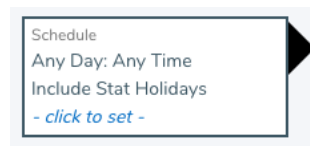
Each unit can have a call-transfer number set transferring employees to at the end of their absence-call.

- Multiple numbers can be set for the unit, but only one can be active at a given time – these numbers will be applied to all absence-calls for this unit.
- By default, there is no transfer number, though the transfer settings from the previous EARL system have been manually entered into mySchedule EARL.
- If an employee is cancelling shifts in multiple units, the call will transfer to the active number of the unit of the first shift cancelled by the employee.
- Phone extensions are now supported, and can be added or removed at any time.



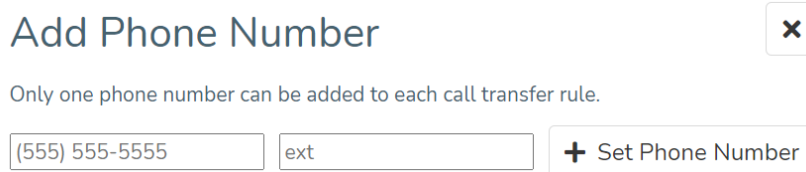


- a. To set a new Call Transfer Rule, click the **New Call Transfer Rule** button.
- b. To set a **Schedule**, select the “click to set” field in the **Schedule** box. By default, the schedule will apply to all days and times.

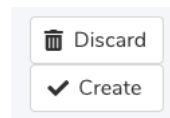


This will open the Schedule overlay, where you can select days of the week and times of day for the routing to be in effect. The overlay has three sections. This overlay is the same as the one for Configured Rules, see 3. Configured Rules, section d. above for more details.

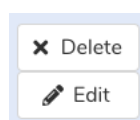
- c. To enter a phone number, select the **Add Phone Number** button. In the overlay, enter the phone number in the first box. To add an extension, enter the extension number in the second box (or leave blank if you are not adding an extension). To confirm the phone number, select the Set Phone Number button. To exit the overlay without entering a number, select the X button in the top-right of the overlay.



- d. Once the phone number and schedule are set, select Create to activate the rule, or Discard to delete the rule without activating it.



- e. Active rules can be deleted by clicking Delete, or Edited by clicking the Edit button.



## 5. Fallback Information

The **Fallback Information** section outlines the fallback details for the unit, if the configured rules and default rules do not indicate any recipients for the EARL.

Manager's Manager	LISA SMITH (00000)
Fallback Email *	StaffingCoordinators@northernhealth.ca
Unit Scheduling Team	Fort St. John - North Peace 3

- a. The **Manager's Manager** field indicates who will receive notifications when the Manager position is vacant and there are no other recipients for the EARL.
- b. The **Fallback Email** field indicates who will receive email notifications when the unit has no Manager, Delegates, or Manager's Manager. This will be routed to the EARL administration team at [HRISRegionalSupport@northernhealth.ca](mailto:HRISRegionalSupport@northernhealth.ca) for all units. In this case, the administration team will reach out to help identify and provide access to an alternate or temporary manager for the unit.
- c. The **Unit Scheduling Team** indicates the Staffing Scheduling Team who will receive the mySchedule-based EARL notifications. **IMPORTANT** – Procura Schedulers must be set as an email recipient in the Configured Rules section, as this is the only method for Procura Schedulers to be notified of an absence. No configuration is required for ESP Schedulers.