SARA: Online Leave Form

Frequently Asked Questions (FAQs) for Managers

Submitting, approving and managing leave requests

About the Online Leave form

1. Why is there a new online leave form?

HealthShare NSW and eHealth NSW have collaborated with a number of Health Agencies to design and pilot a new online leave form that is simple, fast and easy to use

2. What are the key benefits of the new form?

- Accessible anywhere and at any time
- Compatible with smartphones and tablets
- Form pre-populates with user's StaffLink details and name of manager
- Check on progress of requests at any time
- Check leave balances
- Automated approval workflow to manager and HR/Workforce unit
- Sends reminder emails to managers to approve requests
- Sends invitation to add approved leave to Outlook calendar

3. Where can I find training resources?

HealthShare NSW has developed two videos to help you get started:

- Completing a leave form
- Approving a leave form

4. How do I or my staff access the leave form?

Via a computer:

- Go directly to the SARA Customer Portal
- Enter your **StaffLink username** (employee number) and **password**
- Select **Make a Request,** then select **Request Leave** from the Service Catalogue or from the prepopulated Popular Items

Via a smart device:

- Type **URL** https://www.sara.health.nsw.gov.au directly into your browser on a smart device
- Enter your **StaffLink username** (employee number) and **password**
- Type **Request Leave** in the Search field and click

Submitting the form

5. Are all leave types covered by this form?

- Yes. Click the **drop down arrow** in the **Category** field to select from the most common leave options
- **Other Leave** can be selected for additional leave options such as FACS Leave and Study Leave
- **Type** field is to be selected to choose the leave type

6. What if I my staff have multiple assignments?

- Employees can click the **drop down arrow** in **Assignment Number** field and select the relevant assignment number

7. What if the name of the employee's manager in the form is not correct?

- Employees can **manually update** the manager's name upon request
- Clicking in the **Approving Manager** field, typing the **name of the manager** and click to load the correct name from the results will change this
- This information is driven from the StaffLink hierarchy. Employees may contact you if this is not correct.

> Tip: If a manager position has 2 or more employees assigned to it, the system will select alphabetically based on name

8. Can Shift work employees use this form?

- Yes. When employees select **Annual Leave** and then **Pay in Advance**, the Shift Details section will display.
- Selecting **Yes** and then **Add Shifts** to indicate the shifts they would have worked if not on leave

> Tip: For help on how to enter shift details employees or managers watch the Completing a Leave Form video.
> Fast forward to the 05:50 minute mark by dragging the blue line in the play bar.

9. How will my employees know if their leave is approved?

Employees will receive an email notification from NSWH Service Management when their leave form has been approved

A system reminder email is generated to the employees manager every 7 days if the leave form has not been approved/actioned.

10. Employees can add their approved leave to their calendar?

- Employees will receive an email notification from NSWH Service Management to say 'Leave has been approved - please add this calendar entry into your calendar'
- Simply clicking the ✓ Accept option at the top of the email will add to calendar.

11. How can employees check the progress of their form?

- The system will email the employee as the form progresses through the approval chain
- Tracking is also available to track the leave requests in the SARA Customer Service Portal Click MY ITEMS and select Approvals. Alternatively, the homepage of SARA will display recent items. You can select the approvals tab to approve requests
- Your requests will have one of the following **States**:
  - *Awaiting Acceptance* - form is waiting for manager and/or HR-Workforce approval
  - *Work in Progress* - the Service Centre is processing the request
  - *Closed Complete* - all actions have been completed

12. How can employees check the progress of the leave form request?

- Employees will receive emails as the form progresses through the approval chain
- They can also track their leave requests in the Customer Service Portal in MY ITEMS
- The requests will have one of the following **States**:
  - *Awaiting Acceptance* - form is waiting for manager and/or HR-Workforce approval
  - *Work in Progress* - the Service Centre is processing the request
  - *Closed Complete* - all actions have been completed

Reviewing, amending or cancelling leave

13. How can employees amend their leave request?

- Log in to the Customer Service Portal
- You can only amend if your leave request is not in a state of Closed Complete or Work in Progress.
- Click MY ITEMS to check the **State** of your request.

Follow these steps to amend a request:

- Select **Request Leave**
- Your details automatically populate from StaffLink
- Select ◉ Amended button in **New Application or Amended Application** section
- Click the **drop down arrow** at the end of **Original Request** field and select the leave request to be amended
- Make the changes, attach any necessary documentation, and click SUBMIT

- Employees will receive a confirmation email detailing the leave request change with a unique ID number
- The form will be auto-forwarded to their manager and/or HR/Workforce team to approve

14. How do employees cancel their leave request?

- Log in to SARA Customer Portal
- Click MY ITEMS and
- Click on the request
- Click × Cancel Request
- If the Cancel button has disappeared, contact the Customer Service Team for assistance. This happens when the leave **State** updates to **Work in Progress** indicating the Service Centre is processing your request, or to **Closed Complete**
  - **The approving manager will be notified via e-mail if an employee is amending or cancelling a leave request**

15. How do I approve or reject an employee's leave request?

- A manager will receive an email notification each time a team member submits a leave request
- Click Approve to open a reply email window
  - Type any relevant comments in the reply email window
  - Click **Send**

What happens next?

- SARA Customer Portal request record will be updated
- Email is sent to the next person in approval workflow (if required)
- Employee receives email advising leave request approved and an email invitation to add the calendar entry for leave period into your calendar

Note: prior to approving a request, managers should follow local business practice to confirm leave entitlements and roster business requirements

Watch this Approving a leave form video to learn more about approving.

16. How do I reject an employees leave request?

- Click Comment and Reject
- Type comments in the reply email window to explain why request is rejected
- Click **Send**

What happens next?

- Customer Service Portal request record will be updated
- Email is sent to staff member advising leave request has been rejected and reason

17. Does an approved leave request auto-update the rostering system?

- No, the leave dates still need to be entered into the rostering system separately
- The system will send a **reminder email** to the manager to roster the leave (or forward the approved request to a centralised rostering unit)

Note: Integration with HealthRoster is being investigated by eHealth NSW to find a viable solution

More information

- For technical support: contact the State Wide Service Desk (SWSD) on 1300 28 55 33
- For navigation support: contact HealthShare Customer Service team on 1300 679 367