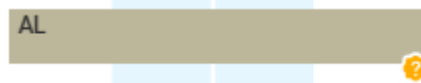


Unavailabilities

Approve/Reject Annual Leave Requests

- Using Loop, staff will be able to submit their AL requests directly into the roster to then be Approved or Rejected as appropriate.
- AL requests will show in the roster with the orange question mark icon in the bottom corner.



- To Approve or Deny an AL request, right-click on the request in the roster and select **Approve** or **Reject** as appropriate.

Training Ward Person Search... [Checkmark icon]

July 2025

	14	15	16	17	18	19	20	21	22	23	24	25	26	27
RN-RN-RN 137	LDx3	LDx3	LDx3	LDx3	LDx3	LDx3	LDx3	LDx3	LDx3	LDx3	LDx3	LDx3	LDx3	LDx3
HCSW-HCSW-HCSW 84	Nx2	N	N	N	Nx2	Nx2	Nx2	Nx2	Nx2	Nx2	Nx2	Nx2	Nx2	Nx2
SCN-SCN-Band 7 RN 20	DO	DO	DO	DO	DO	DO	DO	DO	DO	DO	DO	DO	DO	DO

Training Ward 14 July 2025

SCN

RN Baggins, Frodo (Band 7 RN)

RN

RN Gamgee, Samwise (Band 6 RN) AL

RN Grey, Gandalf (Band 6 RN) N N N

RN Adan, Boromir (Band 5 RN) DO DO

RN Artanis, Galadriel (Band 5 RN) ML1

RN Brandybuck, Merry (Band 5 RN) DO

RN Gloin, Gimli (Band 5 RN) DO DO

RN Gollum, Smeagol (Band 5 RN)

RN Gondor, Aragorn

Right-click context menu:

- Edit Unavailability
- Retest Rules
- Delete Unavailability
- Approve Request** (highlighted with red box and mouse cursor)
- Reject Request** (highlighted with red box and mouse cursor)
- Send Notification
- Add Unavailability

- A rejection reason will need to be entered when rejecting an AL request.

Reject Request
✕

?

Person Samwise Gamgee

Reason Annual Leave

Request Dates 21/07/2025 - 25/07/2025

Notes

Enter rejection notes

- Approved AL will appear without the orange question mark icon.
- Rejected AL will appear as a purple cancelled shift with a red line through it, and the rejection reason can be viewed by hovering over the shift.

☐ Training Ward

Person Search...

July 2025

	21	22	23	24	25	26
Training Ward						
RN-RN-RN 108	LDx3	LDx3	LDx3	LDx3	LDx3	LDx3
HCSW-HCSW-HCSW 67	Nx2	Nx2	Nx2	Nx2	Nx2	Nx2
SCN-SCN-Band 7 RN 15	DO	DO	DO	DO	DO	DO

Training Ward

14 July 2025

SCN

RN Baggins, Frodo (Band 7 RN)

Approved AL Request

Rejected AL Request

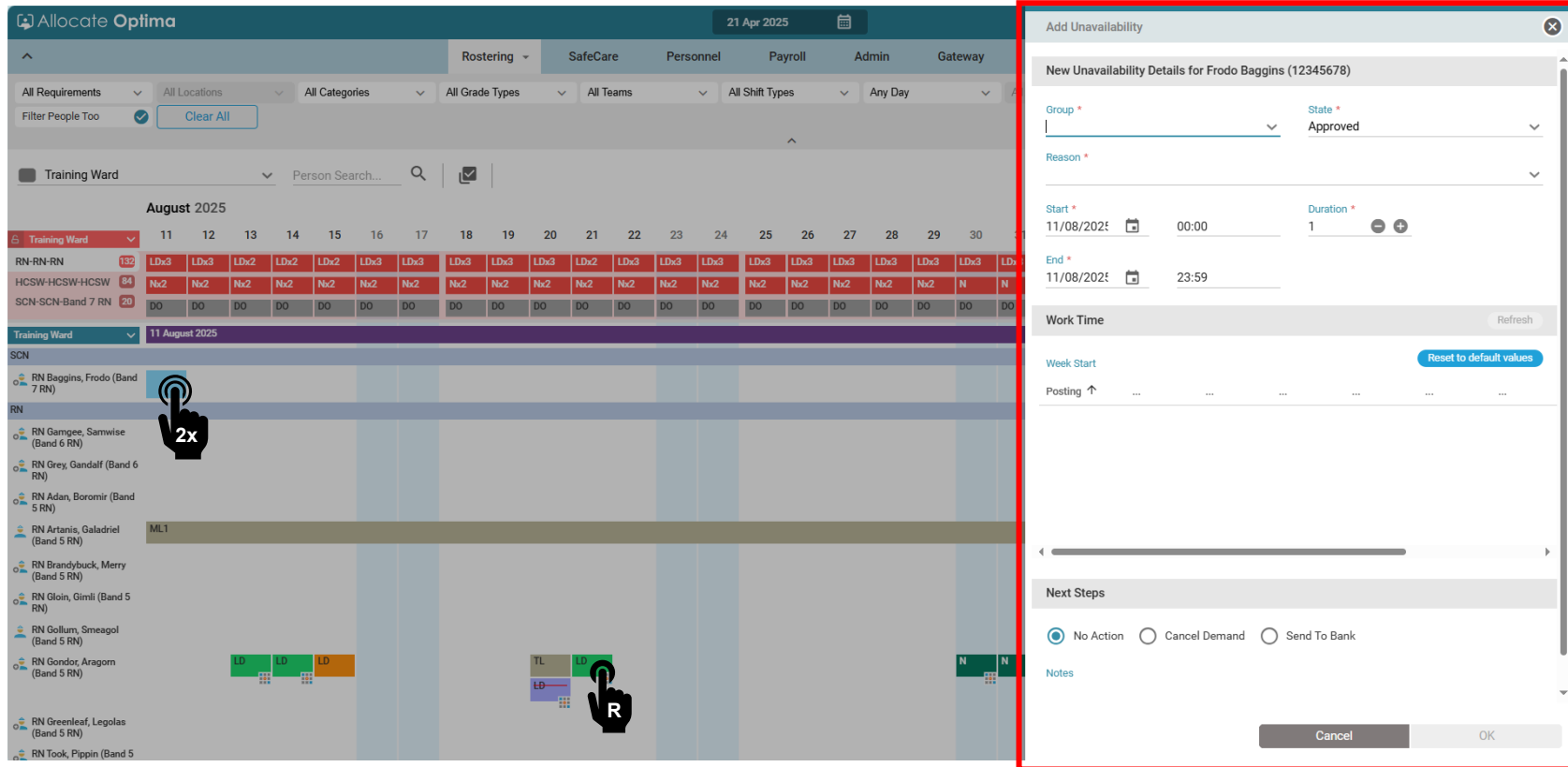
RN

RN Gamgee, Samwise (Band 6 RN)

RN Grey, Gandalf (Band 6 RN)

Manually Enter AL and Sickness

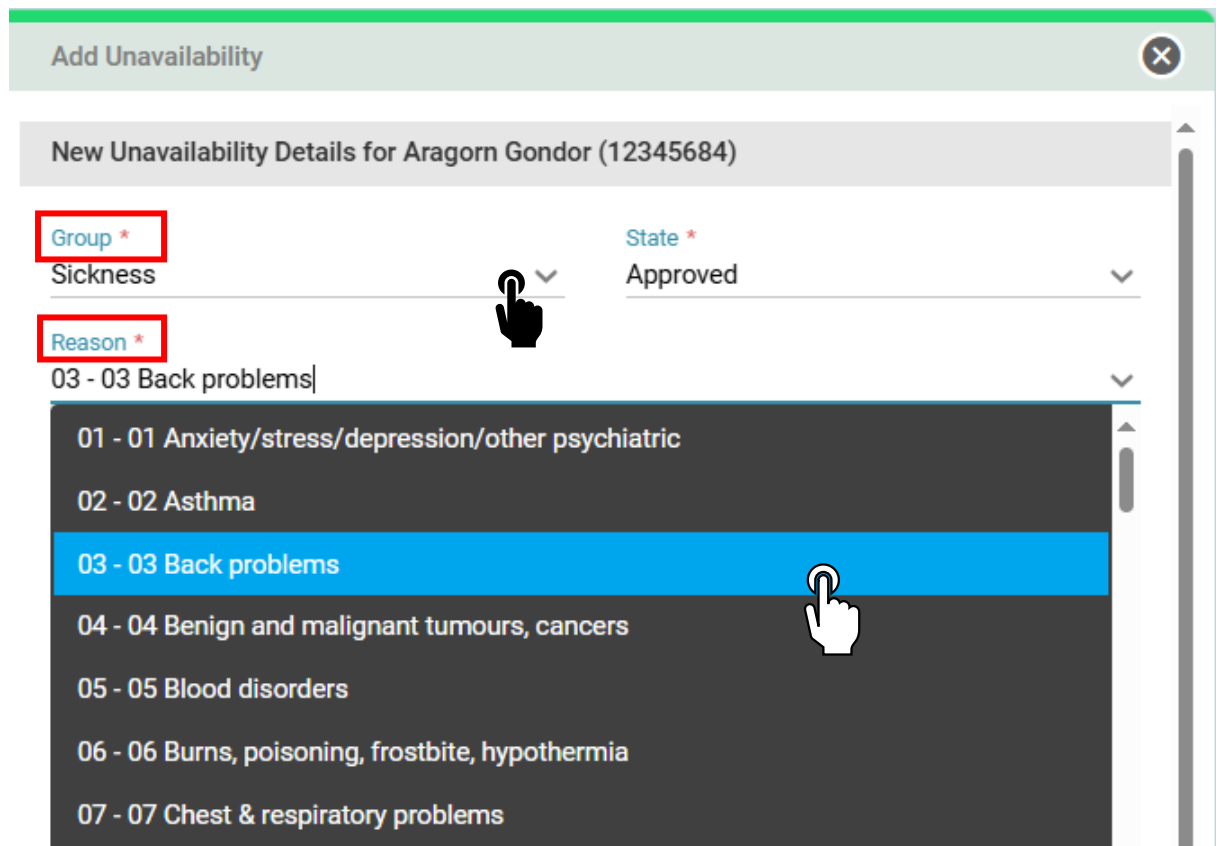
- Unlike SSTs, unavailabilities can be entered into Optima without an underlying shift; **this is only appropriate for AL and Mat Leave absences** as these will be entered before the roster has been completed and payment for these absences is not affected by the underlying shifts – all other unavailabilities must have an underlying shift rostered.
- To manually enter AL without an underlying shift, double click on the relevant date in the roster to open the unavailability panel.
- To enter an unavailability over an existing shift, right-click on the rostered shift and select **Add Unavailability** from the drop-down menu to open the unavailability panel.



The screenshot displays the Allocate Optima interface. The main view shows a roster for August 2025, with a list of staff members on the left and a grid of dates (11-30) on the right. A hand icon with a '2x' magnifying glass is pointing to the date 11 in the roster. A second hand icon with an 'R' is pointing to a shift block in the roster.

The 'Add Unavailability' panel is open on the right, showing details for Frodo Baggins (12345678). The panel includes fields for Group, State (Approved), Reason, Start (11/08/2025 00:00), End (11/08/2025 23:59), and Duration (1). The Work Time section shows a Week Start and a Posting table. The Next Steps section has radio buttons for No Action (selected), Cancel Demand, and Send To Bank. The Notes section is empty. The panel has a Cancel button and an OK button.

- In the Unavailability panel, select the relevant **Group** and **Reason** from the drop-down menus.



Add Unavailability

New Unavailability Details for Aragorn Gondor (12345684)

Group *
Sickness

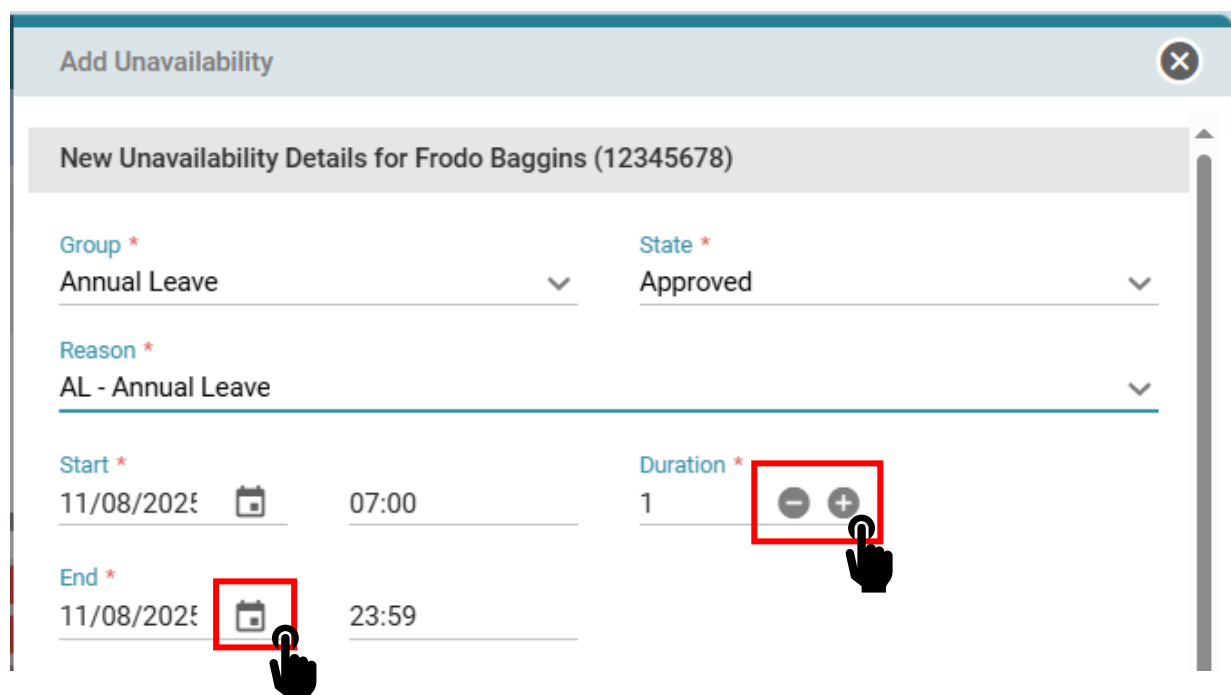
State *
Approved

Reason *
03 - 03 Back problems

- 01 - 01 Anxiety/stress/depression/other psychiatric
- 02 - 02 Asthma
- 03 - 03 Back problems**
- 04 - 04 Benign and malignant tumours, cancers
- 05 - 05 Blood disorders
- 06 - 06 Burns, poisoning, frostbite, hypothermia
- 07 - 07 Chest & respiratory problems

NOTE: once the drop-down menu is opened, you can start typing the required reason to the filter the options quickly.

- The enter the relevant dates using either the calendar options or by increasing or reducing the duration using the + and – buttons.



Add Unavailability

New Unavailability Details for Frodo Baggins (12345678)

Group *
Annual Leave

State *
Approved

Reason *
AL - Annual Leave

Start *
11/08/2025 07:00

End *
11/08/2025 23:59

Duration *
1

– +

- When entering a **Sickness**, several additional options will become available within the panel – these are not mandatory fields and only need completed if relevant.
- There are no Secondary Sickness Reasons available to select so you can disregard this field.

Add Unavailability

New Unavailability Details for Aragorn Gondor (12345684)

Group *
Sickness

State *
Approved

Reason *
03 - 03 Back problems

Secondary Sickness Reason
-

Certification
Not Certified

☐ Work Related Injury

☐ Return To Work Interview

☐ Refer To Occ Health

Third Party
-

Return To Work Interview Date

Occ Health Referral Date

- For a part-day absence, manually adjust the start and end time by typing into the **Start** and **End** fields.

Add Unavailability

New Unavailability Details for Frodo Baggins (12345678)

Group *
Annual Leave

State *
Approved

Reason *
AL - Annual Leave

Start *
11/08/2025

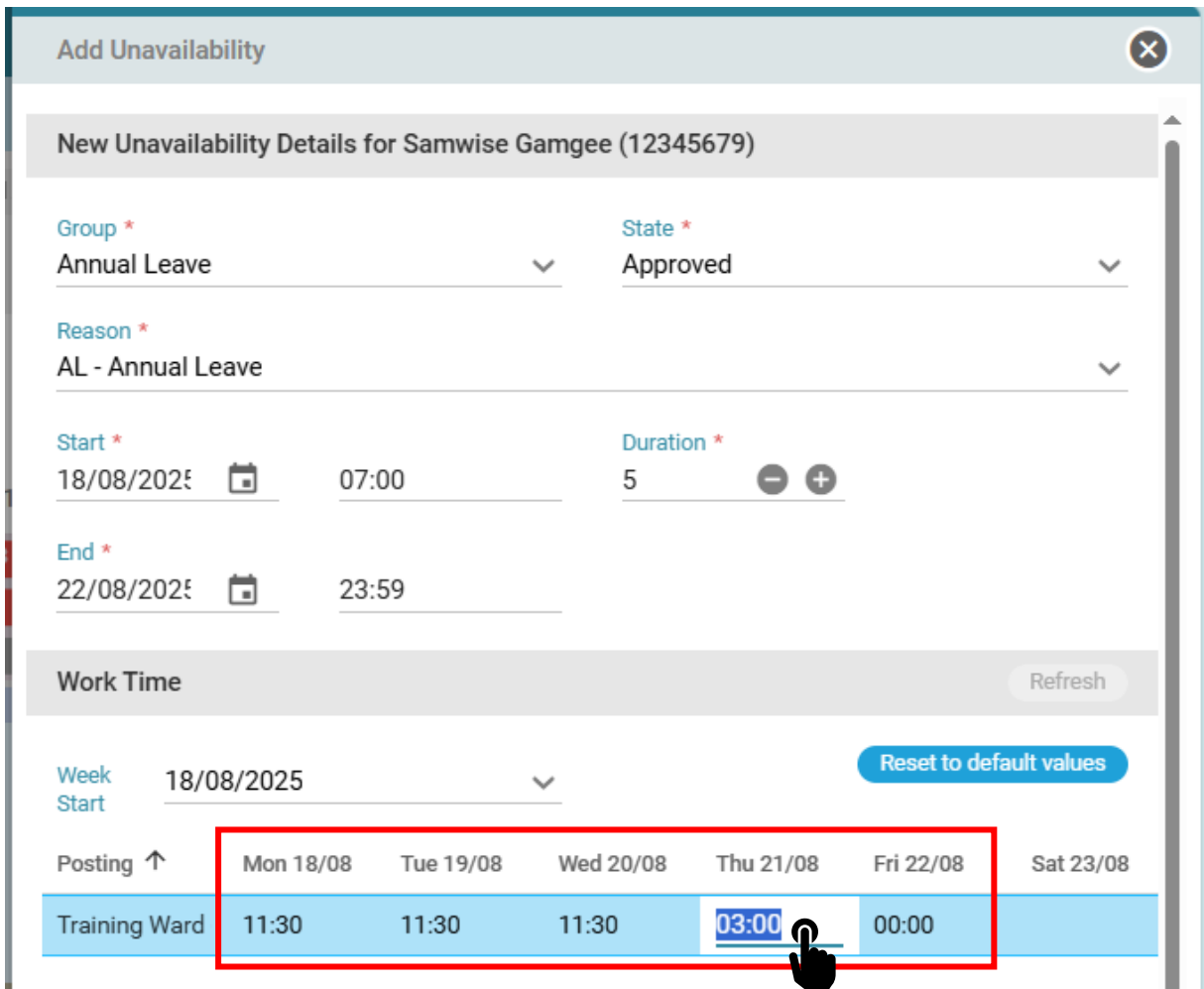
07:00

Duration *
1

End *
11/08/2025

13:30

- **You must always check the underlying hours for the absence in the Work Time section** of the unavailability panel, even if there is an underlying shift rostered.



Add Unavailability

New Unavailability Details for Samwise Gamgee (12345679)

Group *
Annual Leave

State *
Approved

Reason *
AL - Annual Leave

Start *
18/08/2025 07:00

Duration *
5

End *
22/08/2025 23:59

Work Time

Week Start 18/08/2025

Reset to default values

Posting ↑	Mon 18/08	Tue 19/08	Wed 20/08	Thu 21/08	Fri 22/08	Sat 23/08
Training Ward	11:30	11:30	11:30	03:00	00:00	

- If these hours are incorrect/missing, you must manually edit or enter them by typing directly into the field

NOTE: Keep a close eye on the **Hours Left** column on the right-hand side of the roster, especially when there's an unavailability rostered, to ensure the Work Time hours are correct.

- Once the information has been entered into the unavailability panel, click **OK**. The rostered shift(s) will be cancelled and will now appear as a purple shift with a red line through it underneath the unavailability.

AL		
LD	LD	LD

NOTE: Cancelled shifts underlying unavailabilities still need to be **Finalised** along with worked shifts and absences.

Entering TOIL/Flexi

- TOIL and Flexi absences are entered in the way as AL and Sickness absences.
- The primary difference with these types of leave is that the **Work Time** section (i.e. the underlying hours) should always be set to 0.
- This is because, with TOIL/Flexi, the staff member has already had the additional hours entered and counted in the roster – if the hours are then entered again in their unavailability, they will be counted twice and the staff member's Hours Left column will show an incorrect balance.
- For example, below, an additional TOIL shift has been entered for this staff member resulting in a negative balance in their Hours Left column.

August 2025								O/T Hrs	Net Hrs Left	Hours Left	Monthly Hrs Left
Training Ward		Monday 11	Tuesday 12	Wednesday 13	Thursday 14	Friday 15	Saturday 16	Sunday 17			
RN-RN-RN	29	LDx2	LDx2	LDx2	LDx2	LD	LDx3	LDx3			
HCSW-HCSW-HCSW	21	Nx2	Nx2	Nx2	Nx2	Nx2	Nx2	Nx2			
SCN-SCN-Band 7 RN	5	DO	DO	DO	DO	DO	DO	DO			
RN Gondor, Aragorn (Band 5 RN)		LD	LD			LD			- 80:30	-11:30	-
RN Greenleaf, Legolas (Band 5 RN)										30	-
RN Took, Pippin (Band 5 RN)										30	-
RN Undomiel, Arwen (Band 5 RN)										30	-
RN White, Samwise									100:30	07:30	

Long Day (LD) Training Ward
07:00 - 19:30
15 Aug 2025

 Duty Note
TOIL shift

0 minutes ago

- If an unavailability were added which included those hours in the Work Time section, this would not balance out the Hours Left column.

Add Unavailability

New Unavailability Details for Aragorn Gondor (12345684)

Group *

Other Leave

State *

Approved

Reason *

TL - TOIL Time Back

Start *

12/08/2025

07:00

Duration *

1

End *

12/08/2025

23:59

Work Time

Refresh

Week Start

11/08/2025

Reset to default values

Posting ↑

Mon 11/08

Tue 12/08

Wed 13/08

Thu 14/08

Fri 15/08

Sat 16/08

Training Ward

11:30

- The outstanding hours balance remains exactly the same, as the additional hours have **not** been deducted through the unavailability.

August 2025								O/T Hrs	Net Hrs Left	Hours Left
	Monday 11	Tuesday 12	Wednesday 13	Thursday 14	Friday 15	Saturday 16	Sunday 17			
Training Ward										
RN-RN-RN 30	LDx2	LDx3	LDx2	LDx2	LD	LDx3	LDx3			
HCSW-HCSW-HCSW 21	Nx2	Nx2	Nx2	Nx2	Nx2	Nx2	Nx2			
SCN-SCN-Band 7 RN 5	DO	DO	DO	DO	DO	DO	DO			
RN Gondor, Aragorn (Band 5 RN)	LD	TL			LD				80:30	-11:30
		LD								

Add Unavailability

New Unavailability Details for Aragorn Gondor (12345684)

Group *

Other Leave

▼

State *

Approved

▼

Reason *

TL - TOIL Time Back

▼

Start *

12/08/2025

07:00

Duration *

1

End *

12/08/2025

23:59

Work Time

Refresh

Week Start

11/08/2025

▼

Reset to default values

Posting ↑	Mon 11/08	Tue 12/08	Wed 13/08	Thu 14/08	Fri 15/08	Sat 16/08
Training Ward		00:00				

August 2025								O/T Hrs	Net Hrs Left	Hours Left	Mt Lf
Training Ward	Monday 11	Tuesday 12	Wednesday 13	Thursday 14	Friday 15	Saturday 16	Sunday 17				
RN-RN-RN 30	LDx2	LDx3	LDx2	LDx2	LD	LDx3	LDx3				
HCSW-HCSW-HCSW 21	Nx2	Nx2	Nx2	Nx2	Nx2	Nx2	Nx2				
SCN-SCN-Band 7 RN 5	DO	DO	DO	DO	DO	DO	DO				
RN Gondor, Aragorn (Band 5 RN)	LD	TL LD			LD			-	92:00	00:00	