VelocityEHS Notification Triggers and Contents

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Contents

Overview

This document lists the available VelocityEHS notification triggers along with the email content generated for each trigger. Administrators can use this document during notification setup to understand what a given notification will consist of.

Words surrounded by angular brackets (i.e., <>) are tags. Tags will be replaced with record-specific content when each notification is generated. For example, for an 'Environmental Release' incident, the <Incident Types> tag will be replaced with the text "Environmental Release".

Incident

Immediate Notifications

✅ **Incident reported:** A notification that is sent when an incident is first reported.

Subject: <IncidentTypes> <IncidentCategory> reported at <ReportedLocation>

The following <IncidentTypes> <IncidentCategory> was reported by <Reporter>. <IncidentStatus> is the next required step, which is the responsibility of <ResponsibleCurrent>.

<Incident Number Link>

Description: <IncidentDescription>

✅ **Incident closed:** A notification is sent when an incident has been closed.

Subject: <IncidentTypes> <IncidentCategory> at <ReportedLocation> has been closed

The following <IncidentTypes><IncidentCategory> has been closed by <ResponsiblePrevious>.

<Incident Number Link>

Description: <Incident Description>

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✅ **Employee injury/illness reported**: A notification that is sent when an employee injury/illness is reported.

Subject: Employee <IncidentTypes> <IncidentCategory> reported at <ReportedLocation>

The following <IncidentTypes> <IncidentCategory> was reported by <Reporter>. <IncidentStatus> is the next required step, which is the responsibility of <ResponsibleCurrent>.

<Incident Number Link>

Description: <IncidentDescription>

✅ **Lost/restricted time reported**: A notification that is sent when a lost time/restricted time incident is reported.

Subject: Lost or restricted time incident reported at <ReportedLocation>

The following incident, involving lost or restricted time, occurred on <IncidentDate> and was reported by <Reporter> on <DateReported>. <IncidentStatus> is the next required step, which is the responsibility of <ResponsibleCurrent>.

<Incident Number Link>

Description: <IncidentDescription>

✔ **Fatality reported**: A notification that is sent when an incident is saved as Fatality = 'Yes'.

Subject: Fatality reported at <ReportedLocation>

The following fatality occurred on <DateOfIncident> and was reported by <Reporter> on <DateReported>. The incident is currently in the <IncidentStatus> stage.

<Incident Number Link>

Description: <IncidentDescription>

<ResponsibleRoleCurrent>: <ResponsibleCurrent>

✔ **Investigation completed**: A notification that is sent when investigation of incident is completed and incident is still open (incident advances from Investigation to a status other than Closed).

Subject: <IncidentTypes> <IncidentCategory> investigation at <ReportedLocation> has been completed

The following <IncidentTypes> <IncidentCategory> investigation has been completed by <ResponsiblePrevious>. <IncidentStatus> is the next required step, which is the responsibility of <ResponsibleCurrent>.

<Incident Number Link>

Description: <IncidentDescription>

✓ **Review completed**: A notification that is sent when review of incident is completed and incident is still open (incident advances from Detailed Investigation to a status other than Closed).

Subject: <IncidentTypes> <IncidentCategory> review at <ReportedLocation> has been completed

The following <IncidentTypes> <IncidentCategory> review has been completed by <ResponsiblePrevious>. <IncidentStatus> is the next required step, which is the responsibility of <ResponsibleCurrent>.

<Incident Number Link>

Description: <IncidentDescription>

✓ **Ready for closure**: Notification sent when last corrective action completed and Incident Closure represents the next workflow action.

Subject: <IncidentTypes> <IncidentCategory> #<IncidentNumber> is ready for closure

All corrective actions assigned against the following <IncidentTypes> <IncidentCategory> have been completed. Final closure is required by <ResponsibleCurrent>.

<Incident Number Link>

Description: <IncidentDescription>

✅ **Reverted to investigation**: A notification that is sent when an incident is reverted to investigation.

Subject: <IncidentTypes> <IncidentCategory> #<IncidentNumber> has been reverted to investigation

The following <IncidentTypes> <IncidentCategory> has been reverted back to the investigation stage, which is the responsibility of <ResponsibleCurrent>.

<Incident Number Link>

Description: <IncidentDescription>

✅ **Reverted to review**: A notification that is sent when an incident is reverted to review.

Subject: <IncidentTypes> <IncidentCategory> has been reverted to review

The following <IncidentTypes> <IncidentCategory> has been reverted back to the review stage, which is the responsibility of <ResponsibleCurrent>.

<Incident Number Link>

Description: <IncidentDescription>

✅ Reverted to pending closure: A notification that is sent when an incident is reverted to pending closure.

Subject: <IncidentTypes> <IncidentCategory> #<IncidentNumber> has been reverted to pending closure

The following <IncidentTypes> <IncidentCategory> has been reverted back to the pending closure stage, which is the responsibility of <ResponsibleCurrent>.

<Incident Number Link>

Description: <IncidentDescription>

✅ Investigation reassigned: A notification that is sent when responsibility for investigation is reassigned while status is Investigation. When recipient role assigned = 'Responsible for Investigation', the distribution will include both to the old responsible and the new responsible persons.

Subject: Investigation of <IncidentTypes> <IncidentCategory> at <ReportedLocation> has been reassigned

The <IncidentTypes> <IncidentCategory> submitted on <DateReported> has been reassigned.

<Incident Number Link>

Description: <IncidentDescription>

<ResponsibleRoleCurrent>: <ResponsibleCurrent>

- ✅ **Review reassigned**: A notification that is sent when responsibility for review is reassigned while status is review. When recipient role assigned = 'Responsible for Review', the distribution will include both to the old responsible and the new responsible persons.

Subject: Review of <IncidentTypes> <IncidentCategory> at <ReportedLocation> has been reassigned

The <IncidentTypes> <IncidentCategory> submitted on <DateReported> has been reassigned.

<Incident Number Link>

Description: <IncidentDescription>

<ResponsibleRoleCurrent>: <ResponsibleCurrent>

- ✅ **Closure reassigned**: A notification that is sent when responsibility for closure is reassigned while status is pending closure. When recipient role assigned = 'Responsible for Closure', the distribution will include both to the old responsible and the new responsible persons.

Subject: Closure of <IncidentTypes> <IncidentCategory> at <ReportedLocation> has been reassigned

The <IncidentTypes> <IncidentCategory> submitted on <DateReported> has been reassigned.

<Incident Number Link>

Description: <IncidentDescription>

<ResponsibleRoleCurrent>: <ResponsibleCurrent>

Recurring Summary Notifications

✔ **Summary of reported incidents**: Summary of incidents reported since the last summary notification, grouped by Category, starting with Incident, then subgroups of Incident Types. Being included are all incidents reported at the location of the notification, when the recipient represents a Name. Only incidents in recipient's area of responsibility get included, when the notification is assigned to a Role.

Subject: Summary of reported incidents

The following incidents have been reported at <Recipient's Location(s)> in the last <X days/24 hours>:

<Incident Number Link>: <Reported Location> - <Incident Types> - <Incident Title>

<Incident Number Link>: <Reported Location> - <Incident Types> - <Incident Title>

...

This notification is assigned for distribution to the following: <List of Roles> and <X> individual<s>

Reminder Notifications

✅ **Estimated lost days exceeded**: A notification that is sent X days after number of Lost days has exceeded the estimate provided for total Lost time; reset if Returned Date provided.

Subject: Estimated Lost days have passed for incident #<IncidentNumber>

The number of Lost days to date recorded against the following incident exceeds the estimate provided for total Lost time. This is a reminder that the person who is responsible for investigating this incident needs to update the incident report by providing the date returned and actual number of Lost days as soon as the person involved is back to normal duty.

<Incident Number Link>

Description: <IncidentDescription>

✅ **Estimated restricted days exceeded**: A notification that is sent X days after number of Restricted days has exceeded the estimate provided for total Restricted time; reset if Returned Date provided.

Subject: Estimated Restricted days have passed for incident #<IncidentNumber>

The number of Restricted days to date recorded against the following incident exceeds the estimate provided for total Restricted time. This is a reminder that the person who is responsible for investigating this incident needs to update the incident report by providing the date returned and actual number of Restricted days as soon as the person involved is back to normal duty.

<Incident Number Link>

Description: <IncidentDescription>

✓ **Investigation incomplete**: A notification that is sent if investigation stage not completed X days after incident occurrence.

Subject: <IncidentTypes> <IncidentCategory> investigation at <ReportedLocation> is incomplete

The following <IncidentTypes> <IncidentCategory> occurred <DaysSinceOccurred> days ago and its investigation has not been completed.

<Incident Number Link>

Description: <IncidentDescription>

<ResponsibleRoleCurrent>: <ResponsibleCurrent>

✓ **Review incomplete**: A notification that is sent if review stage not completed X days after incident occurrence.

Subject: <IncidentTypes> <IncidentCategory> review at <ReportedLocation> is incomplete

The following <IncidentTypes> <IncidentCategory> occurred <DaysSinceOccurred> days ago and its review has not been completed.

<Incident Number Link>

Description: <IncidentDescription>

<ResponsibleRoleCurrent>: <ResponsibleCurrent>

✅ **Incident not closed**: A notification that is sent if incident not closed X days after incident occurrence.

Subject: <IncidentTypes> <IncidentCategory> at <ReportedLocation> has not been closed

The <IncidentTypes> <IncidentCategory> submitted by <Reporter> on <DateReported> has not been closed.

<Incident Number Link>

Description: <IncidentDescription>

<ResponsibleRoleCurrent>: <ResponsibleCurrent>

✅ **No activity**: A notification that is sent on open incidents which are not updated in X days; the notification is repeatable.

Subject: Inactivity notification for <IncidentTypes> <IncidentCategory> #<IncidentNumber>

The <IncidentTypes> <IncidentCategory> submitted by <Reporter> on <DateReported> has not been updated in <DaysNoActivity> days.

<Incident Number Link>

Description: <IncidentDescription>

<ResponsibleRoleCurrent>: <ResponsibleCurrent>

Audit

Immediate Notifications

✓ **Scheduled**: A notification that is sent when the status advances from Draft. NOTE: the word recurring will be added to the "subject' and "content" areas in the event that the scheduled audit is recurring.

Subject: <Template Name> scheduled at <Location>

The following <Category> has been scheduled:

<Audit Number Link>: <Audit Name Link>

Conducted By: <Auditor/Inspector/Observer>

Team: <Team>

Scheduled Start: <Scheduled Start Date>

Scheduled End: <Scheduled End Date>

- ✅ **Audit Leader / Inspector Changed**: A notification that is sent when the Audit Leader / Inspector is reassigned while status is Scheduled, In Progress, or Pending Closure. When recipient role assigned = 'Audit Leader', the distribution will include both to the old responsible and the new responsible persons.

Subject: Auditor / Inspector for <Template Name> at <Location> has changed

The following <Category> at <Location> has been reassigned:

<Audit Name Link>

Conducted By: <Auditor/Inspector/Observer>

(Team: <Team>)

Scheduled Start: <Scheduled Start Date>

(Scheduled End: <Scheduled End Date>)

- ✅ **Submitted for review**: A notification that is sent when the status advances to Review.

Subject: <Template Name> at <Location> ready for review

The following <Category> has been completed. <Person Responsible for Current Status> is responsible for reviewing it.

<Audit Number Link>: <Audit Name Link>

Location: <Location>

Conducted By: <Auditor/Inspector/Observer>

✅ **Reverted to in progress**: A notification that is sent when the status is reverted to In Progress.

Subject: <Template Name> from <Scheduled Start Date> has been reverted

The following <Category> has been reverted and therefore has not passed review. Please refer to the <Category> Status log on the Audit Trail page to review the reason provided by the person who sent the <Category> back for revision.

<u><Audit Number Link>: <Audit Name Link></u>

Location: <Location>

Conducted By: <Auditor/Inspector/Observer>

✅ **Review reassigned**: A notification that is sent when the Audit Leader or Responsible for Review is reassigned while status is Review. When recipient role assigned = 'Audit Leader' or 'Responsible for Review', the distribution will include both to the old responsible and the new responsible persons.

Subject: Review for <Template Name> at <Location> has been reassigned

The following <Category> review at <Location> has been reassigned:

<u><Audit Name Link></u>

Conducted By: <Auditor/Inspector/Observer>

(Team: <Team>)

<ResponsibleRoleCurrent>: <ResponsibleCurrent>

- ✅ **Action plan responsibility reassigned**: A notification that is sent when the responsibility for the action plan is modified while status is "Pending Action Plan". When recipient role assigned = "Responsible for Action Plan", the distribution will include both to the old responsible and the new responsible persons.

Subject: Responsibility for Action Plan for <Template Name> at <Location> has been reassigned

The following <Category> requires corrective actions to be created and an Action Plan to be submitted. Responsibility for this has been reassigned to <Person Responsible for Current Status>.

<Audit Number Link>: <Audit Name Link>

Conducted By: <Auditor/Inspector/Observer>

(Team: <Team>)

<ResponsibleRoleCurrent>: <ResponsibleCurrent>

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✅ **Action plan required**: A notification that is sent when the Audit status advances to Pending Action Plan or is reverted to Pending Action Plan.

Subject: <Template Name> at <Location> requires an Action Plan

The following <Category> has been completed. Ensuring corrective actions are created and the Action Plan is submitted is the next required step, which is the responsibility of <Person Responsible for Current Status>.

<Audit Number Link>: <Audit Name Link>

Location: <Location>

Conducted By: <Auditor/Inspector/Observer>

Scheduled Start: <Scheduled Start Date>

Scheduled End: <Scheduled End Date>

<Email content will include note below if this represents a step back in workflow (i.e. status was reverted to 'Pending Action Plan'); not if the status was advanced to 'Pending Action Plan'>

Note: Please refer to the <Category> Status log on the Audit Trail page to review the reason provided by the person who sent the action plan back for revision.

✓ **Action plan submitted**: A notification that is sent when the <Category> status advances from Pending Action Plan to Action Plan Review; or to Pending Closure and there are outstanding corrective actions.

Subject: An Action Plan for <Template Name> has been submitted

An Action Plan has been submitted for the following <Category> and is ready for review. <Current Stage: Action Plan Review/Pending Closure> is the next required step, which is the responsibility of <Person Responsible for Current Status>.

<Audit Number Link>: <Audit Name Link>

Location: <Location>

Conducted By: <Auditor/Inspector/Observer>

Scheduled Start: <Scheduled Start Date>

Scheduled End: <Scheduled End Date>

- ✅ **Action plan review responsibility reassigned**: A notification that is sent when the responsibility for the action plan review is modified while status is "Action Plan Review". When recipient role assigned = "Responsible for Action Plan Review", the distribution will include both to the old responsible and the new responsible persons.

Subject: Responsibility for action plan review for <Template Name> at <Location> has been reassigned

An Action Plan has been submitted for the following <Category> and is ready for review. <Current Stage: Action Plan Review/Pending Closure> is the next required step, and this has been reassigned to <Person Responsible for Current Status>.

<u><Audit Number Link>: <Audit Name Link></u>

Location: <Location>

Conducted By: <Auditor/Inspector/Observer>

Scheduled Start: <Scheduled Start Date>

Scheduled End: <Scheduled End Date>

✅ **Ready for closure**: A notification sent when last corrective action completed and Closure represents the next workflow action.

Subject: <Template Name> at <Location> is ready for closure

All corrective actions assigned for the following <Category> have been completed. Final closure is required by <Person Responsible for Current Status>.

<Audit Number Link>: <Audit Name Link>

Location: <Location>

Conducted By: <Auditor/Inspector/Observer>

Scheduled Start: <Scheduled Start Date>

Scheduled End: <Scheduled End Date>

✅ **Closed**: A notification that is sent when the status advances to Closed.

Subject: <Template Name> at <Location> has been closed

The following <Category> has been closed:

<Audit Number Link>: <Audit Name Link>

Location: <Location>

Conducted By: <Auditor/Inspector/Observer>

Scheduled Start: <Scheduled Start Date>

Scheduled End: <Scheduled End Date>

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Reminder Notifications

✅ **Scheduling reminder**: A notification that is sent if <Category> not started X days before Scheduled Start.

Subject: <Template Name> reminder

The following <Category> is scheduled:

<Audit Number Link>: <Audit Name Link>

Location: <Location>

Leader: <Auditor/Inspector/Observer>

Scheduled Start: <Scheduled Start>

Scheduled End: <Scheduled End>

✅ **No activity**: A notification that is sent on open audits which are not updated in X days; the notification is repeatable.

Subject: Inactivity notification for <Template Name> at <Location>

The following <Category> started on <Start Date> has not been updated in <DaysNoActivity> days.

<Audit Number Link>: <Audit Name Link>

Location: <Location>

Conducted By: <Auditor/Inspector/Observer>

Scheduled Start: <Scheduled Start Date>

Scheduled End: <Scheduled End Date>

Compliance
Immediate Notifications

✅ **Permit renewed**: A notification that is sent when a permit gets renewed.

Subject: Permit at <Permit Location> has been renewed

The following permit has been renewed.

<u><Permit Title Link></u>

Permit Number: <Permit Number>

Start Date: <Expiration Date>

Expiration Date: <Expiration Date>

Permit Limit(s): <Permit Limits>

Source: <u><Regulation Title Link></u>

✅ **On permit expiration date**: A notification that is sent on the Expiration Date of a permit if status is not Inactive.

Subject: Permit at <Permit Location> expires today

The following permit expires today.

<u><Permit Title Link></u>

Permit Number: <Permit Number>

Source: <u><Regulation Title Link></u>

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Reminder Notifications

✅ **Permit expired**: A notification that is sent on permits which are not Inactive X days after the Expiration Date.

Subject: Permit at <Permit Location> expired on <Expiration Date>

The following permit at <Permit Location> has not been renewed.

<Permit Title Link>

Permit Number: <Permit Number>

Source: <Regulation Title Link>

✅ **Permit expiration date approaching**: A notification that is sent on permits which are not Inactive X days before the Expiration Date.

Subject: Permit expiration reminder

The following permit at <Permit Location> will expire on <Expiration Date>.

<Permit Title Link>

Permit Number: <Permit Number>

Source: <Regulation Title Link>

Management of Change (MOC)
Immediate Notifications

✅ **Submit for concept approval**: Sent when the status advances to Concept Approval.
Content Conditions:
- #1: If Emergency, and no previous Concept Revision status.
- #2: If previous Concept Revision status.
- #3: If Temporary/Emergency.

Subject: <Category> <Types> change request submitted at <Location>

The following <Category> <Types> change request requires concept approval by <Person Responsible for Concept Approval>. (See condition #1: This change was approved and implemented on an emergency basis and now requires a full review.) (See condition #2: <Last Reverted By> requested revisions for the following reason: <Revert Reason>. It is currently undergoing a new round of review and approval.) During concept approval the change must be reviewed and the following responsibilities identified: Designers, Approvers, Responsible for Pre Startup Review, and Implementer.

<u><MOC Number Link>: <MOC Title Link></u>

Initiated By: <Initiator>

Initiation Date: <Initiation Date>

Target Completion Date: <Target Completion Date>

(See condition #3: Expiration Date: <Expiration Date>)

✅ **Revision needed**: Sent when the status becomes Concept Revision.
Content Conditions:
- #1: If Temporary/Emergency.

Subject: <Category> <Types> change request at <Location> requires concept revision

<Last Reverted By> requested revisions for the following reason: <Revert Reason>. This change request needs to be resubmitted by <Responsible for Concept Revision> after revisions are made.

<MOC Number Link>: <MOC Title Link>

Initiated By: <Initiator>

<Role Responsible for Concept Approval>: <Person Responsible for Concept Approval>

Initiation Date: <Initiation Date>

Target Completion Date: <Target Completion Date>

(See condition #1: Expiration Date: <Expiration Date>)

✅ **Design approval required**: Sent when the next member of the Design Group becomes Currently Responsible.

Content Conditions:

- ▪ #1: If the status of the change request has not changed between the current approval round and the previous approval round for the same designer.
- ▪ #2: If Emergency, and no previous Concept Revision status.
- ▪ #3: If Permanent, and previous Temporary/Emergency category.
- ▪ #4: If previous Concept Revision status.
- ▪ #5: If Temporary/Emergency.

Subject: <Category> <Types> change request at <Location> requires design approval

(See condition #1: A designer approved this <Category> <Types> change request with the following changes: <Approval Comment>.) (See condition #2: This <Category> <Types> change request was approved and implemented on an emergency basis and now requires a full review.) (See condition #3: The following <Category> <Types> change request was approved and implemented on a temporary basis and is now undergoing approval to be made permanent.) (See condition #4: <Last Reverted By> requested revisions to this <Category> <Types> change request for the following reason: <Revert Reason>. It is currently undergoing a new round of review and approval.) The design must be reviewed for approval, with changes if necessary, by the current designer, <Current Designer>. All other designers whose subsequent review and approval is required will be notified when they become responsible.

<MOC Number Link>: <MOC Title Link>

Initiated By: <Initiator>

<Role Responsible for Concept Approval>: <Person Responsible for Concept Approval>

Initiation Date: <Initiation Date>

Target Completion Date: <Target Completion Date>

(See condition #5: Expiration Date: <Expiration Date>)

- ✔️ **Implementation approval required**: Sent when the status becomes Implementation Approval.
  Content Conditions:
    - ▪ #1: If Emergency, and no previous Concept Revision status.
    - ▪ #2: If Permanent, and previous Temporary/Emergency category.
    - ▪ #3: If previous Concept Revision status.
    - ▪ #4: If Temporary/Emergency.

Subject: <Category> <Types> change request at <Location> requires implementation approval

The following <Category> <Types> change request is ready for implementation approval, which is the responsibility of <Currently Responsible Approver(s)>. (See condition #1: This change was approved and implemented on an emergency basis and now requires a full review.) (See condition #2: This change was approved and implemented on a temporary basis and is now undergoing approval to be made permanent.) (See condition #3: <Last Reverted By> requested revisions for the following reason: <Revert Reason>. It is currently undergoing a new round of review and approval.) Approvers are required to review the change request and provide approval if appropriate.

<MOC Number Link>: <MOC Title Link>

Initiated By: <Initiator>

<Role Responsible for Concept Approval>: <Person Responsible for Concept Approval>

Initiation Date: <Initiation Date>

Target Completion Date: <Target Completion Date>

(See condition #4: Expiration Date: <Expiration Date>)

☑ **Pre startup review required**: Sent when the status advances to Pre Startup Review.
Content Conditions:

- ▪ #1: If Emergency, and no previous Concept Revision or Temporary Implementation status.
- ▪ #2: If Temporary/Emergency, and previous Temporary Implementation status.
- ▪ #3: If Permanent, and previous Temporary/Emergency category.
- ▪ #4: If previous Concept Revision status.
- ▪ #5: If Temporary/Emergency.

Subject: Pre startup review required on <Category> <Types> change request at <Location>

The following <Category> <Types> change request requires pre startup review, which is the responsibility of <Person Responsible for Pre Startup Review>. (See condition #1: This change was approved and implemented on an emergency basis and is now undergoing a detailed review and approval.) (See condition #2: This change was approved and implemented on a temporary basis and is now being reverted.) (See condition #3: This change was approved and implemented on a temporary basis and is now undergoing approval to be made permanent.) (See condition #4: <Last Reverted By> requested revisions for the following reason: <Revert Reason>. It is currently undergoing a new round of review and approval.) The change request must be reviewed and the PSSR checklist completed.

<MOC Number Link>: <MOC Title Link>

Initiated By: <Initiator>

<Role Responsible for Concept Approval>: <Person Responsible for Concept Approval>

Initiation Date: <Initiation Date>

Target Completion Date: <Target Completion Date>

(See condition #5: Expiration Date: <Expiration Date>)

Approved for startup: Sent when the status advances to Approved for Startup.
Content Conditions:

- #1: If not Emergency.
- #2: If Temporary/Emergency.

Subject: <Category> <Types> change request at <Location> is approved for startup

<Implementer> is the Implementer for this <Category> <Types> change request. There are no incomplete pre startup action items, therefore the Implementer is required to accept implementation after verifying startup requirements are met. (See condition #1: The implementer will then be required to complete the post startup checklist.)

<u><MOC Number Link>: <MOC Title Link></u>

Initiated By: <Initiator>

<Role Responsible for Concept Approval>: <Person Responsible for Concept Approval>

Initiation Date: <Initiation Date>

Target Completion Date: <Target Completion Date>

(See condition #2: Expiration Date: <Expiration Date>)

✅ **Ready for closure**: Sent when the status advances to Pending Approval to Close.

Subject: <Category> <Types> change request at <Location> is ready for closure

There are no incomplete action items for the following <Category> <Types> change request. Final closure is required by <Person Responsible for Closure>.

[<MOC Number Link>: <MOC Title Link>](#)

Initiated By: <Initiator>

Initiation Date: <Initiation Date>

Target Completion Date: <Target Completion Date>

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✅ **Rejected**: Sent when the status becomes Rejected.
  Content Conditions:
  ▪ #1: If no deleted action items in status Open.
  ▪ #2: If any deleted action items in status Open.

Subject: \<Category> \<Types> change request at \<Location> was rejected

The following \<Category> \<Types> change request was rejected by \<Rejected By> for the following reason: \<Reason Provided>.

<u>\<MOC Number Link>: \<MOC Title Link></u>

Initiated By: \<Initiator>

Initiation Date: \<Initiation Date>

\<Filter>

(See condition #1: This change request has no outstanding action items.) (See condition #2: The following outstanding action items associated with this change request have been deleted.

\<Action Item Number Link>: \<Action Item Title Link>

\<Action Item Number Link>: \<Action Item Title Link>

…

)

✅ **Closed**: Sent when the status advances to Closed.

Subject: \<Category> \<Types> change request at \<Location> has been closed

The following \<Category> \<Types> change request has been closed.

[\<MOC Number Link>: \<MOC Title Link>](#)

Initiated By: \<Initiator>

Initiation Date: \<Initiation Date>

Target Completion Date: \<Target Completion Date>

_____

✔ **Permanent review required**: Sent when the status advances to Permanent Review.

Subject: <Category> <Types> change request at <Location> requires approval to be made permanent

<Requested By> has requested to make this change request permanent for the following reason: <Reason Provided>. If <Person Responsible for Permanent Review> approves, this change must go back through the implementation review, approval and acceptance process. Otherwise, the change will need to undergo approval on an extension or be reverted.

<MOC Number Link>: <MOC Title Link>

Initiated By: <Initiator>

<Role Responsible for Concept Approval>: <Person Responsible for Concept Approval>

Initiation Date: <Initiation Date>

Target Completion Date: <Target Completion Date>

Expiration Date: <Expiration Date>

✅ **Permanent request rejected**: Sent when the change request becomes Temporary Implementation and the previous status was Permanent Review.

Subject: Permanent request rejected on <Category> <Types> change request at <Location>

<Rejected By> has rejected the request to make this change permanent for the following reason: <Reason Provided>. This change must now be reverted to its original condition, which is the responsibility of <Implementer>.

[<MOC Number Link>: <MOC Title Link>](#)

Initiated By: <Initiator>

Initiation Date: <Initiation Date>

Target Completion Date: <Target Completion Date>

Expiration Date: <Expiration Date>

✅ **Extension requested**: Sent when the status advances to Extension Approval.

Subject: Extension requested for <Category> <Types> change request at <Location>

<Requested By> has requested extension on the following <Category> <Types> change request from <Expiration Date> to <Revised Expiration Date> for the following reason: <Reason Provided>. <Person Responsible for Extension Approval> must review and grant or deny the request.

[<MOC Number Link>: <MOC Title Link>]

Initiated By: <Initiator>

<Role Responsible for Concept Approval>: <Person Responsible for Concept Approval>

Initiation Date: <Initiation Date>

Target Completion Date: <Target Completion Date>

✅ **Extension approved**: Sent when the change request status goes from Extension Approval back to Temporary Implementation AND last extension request was approved.

Subject: Extension approved for <Category> <Types> change request at <Location>

<Approved By> has approved the request to extend the Expiration Date on the following <Category> <Types> change request to <Expiration Date>.

<MOC Number Link>: <MOC Title Link>

Initiated By: <Initiator>

Initiation Date: <Initiation Date>

Target Completion Date: <Target Completion Date>

✅ **Extension denied**: Sent when the change request status goes from Extension Approval back to Temporary Implementation AND last extension request was denied.

Subject: Extension denied for <Category> <Types> change request at <Location>

<Rejected By> has denied the request for an extension to this <Category> <Types> change request for the following reason: <Reason Provided>. <Implementer> must take steps to either revert the change, or request approval to make the change permanent.

<MOC Number Link>: <MOC Title Link>

Initiated By: <Initiator>

Initiation Date: <Initiation Date>

Target Completion Date: <Target Completion Date>

Expiration Date: <Expiration Date>

✅ **Concept approval reassigned**: Sent if the MOC Coordinator role is reassigned when it is the role responsible for the current change request state. When recipient role assigned = 'MOC Coordinator', the distribution will include both the old responsible and the new responsible persons.
Content Conditions:
- #1: If Temporary/Emergency.

Subject: Reassignment of concept approval of <Category> <Types> change request at <Location>

Responsibility for concept approval on the following <Category> <Types> change request has been reassigned from <Old Responsible> to <New Responsible>.

<MOC Number Link>: <MOC Title Link>

Initiation Date: <Initiation Date>

Target Completion Date: <Target Completion Date>

(See condition #1: Expiration Date: <Expiration Date>)

✔ **Responsibility changed for design approval**: Sent if the Design Group is modified when it is the role responsible for the current change request state. When recipient role assigned = 'Design Group', the distribution will include both the old responsible and the new responsible persons.
Content Conditions:

- ▪ #1: If Temporary/Emergency.

Subject: Change in responsibility for design approval of <Category> <Types> change request at <Location>

Design approval responsibility on the following <Category> <Types> change request has been modified.

Persons added to the Design Group: <Persons Added>

Persons removed from the Design Group: <Persons Removed>

<MOC Number Link>: <MOC Title Link>

Initiation Date: <Initiation Date>

Target Completion Date: <Target Completion Date>

(See condition #1: Expiration Date: <Expiration Date>)

✅ **Responsibility changed for implementation approval**: Sent if the Approval Group is modified when it is the role responsible for the current change request state. When recipient role assigned = 'Approval Group', the distribution will include both the old responsible and the new responsible persons.
Content Conditions:
- #1: If Temporary/Emergency.

Subject: Change in responsibility for implementation approval of <Category> <Types> change request at <Location>

Implementation approval responsibility on the following <Category> <Types> change request has been modified.

Persons added to the Approval Group: <Persons Added>

Persons removed from the Approval Group: <Persons Removed>

<MOC Number Link>: <MOC Title Link>

Initiation Date: <Initiation Date>

Target Completion Date: <Target Completion Date>

(See condition #1: Expiration Date: <Expiration Date>)

✅ **Pre startup review reassigned**: Sent if the Responsible for Pre Startup Review role is reassigned when it is the role responsible for the current change request state. When recipient role assigned = 'Responsible for Pre Startup Review', the distribution will include both the old responsible and the new responsible persons.
Content Conditions:
- #1: If Temporary/Emergency.

Subject: Pre startup review reassigned on <Category> <Types> change request at <Location>

Responsibility for pre startup review on the following <Category> <Types> change request has been reassigned from <Old Responsible> to <New Responsible>.

<MOC Number Link>: <MOC Title Link>

Initiation Date: <Initiation Date>

Target Completion Date: <Target Completion Date>

(See condition #1: Expiration Date: <Expiration Date>)

- ✅ **Implementer reassigned**: Sent if the Implementer role is reassigned when it is the role responsible for the current change request state. When recipient role assigned = 'Implementer', the distribution will include both the old responsible and the new responsible persons.
  <u>Content Conditions:</u>
    - ▪ #1: If Temporary/Emergency.

Subject: Implementer reassigned on <Category> <Types> change request at <Location>

The Implementer on the following <Category> <Types> change request has been reassigned from <Old Responsible> to <New Responsible>.

<u><MOC Number Link>: <MOC Title Link></u>

Initiation Date: <Initiation Date>

Target Completion Date: <Target Completion Date>

(See condition #1: Expiration Date: <Expiration Date>)

Reminder Notifications

✅ **Expiration reminder**: Sent on temporary (emergency) change requests which are still open X days before the expiration date.

Subject: Expiration date approaching on <Category> <Types> change request at <Location>

The following <Category> <Types> change request expires on <Expiration Date>. <Implementer> must take steps to revert the temporary change by this date, request an extension, or request approval to make the change permanent.

<MOC Number Link>: <MOC Title Link>

Initiation Date: <Initiation Date>

Target Completion Date: <Target Completion Date>

✅ **No activity**: Sent on open change requests which are not updated in X days.
  Content Conditions:
  - #1: If Temporary/Emergency.

Subject: Inactivity notification for <Category> <Types> change request at <Location>

The following <Category> <Types> change request initiated by <Initiator> on <Initiation Date> has not been updated in <DaysNoActivity> days.

<MOC Number Link>: <MOC Title Link>

Target Completion Date: <Target Completion Date>

(See condition #1: Expiration Date: <Expiration Date>)

Risk Analysis
Immediate Notifications

✅ **Analysis Scheduled**: A notification is sent when a risk Analysis is scheduled.

Subject: <Category> scheduled at <Location>

The following <Category> review has been completed by <ResponsiblePrevious>. <Status
The following <Category> has been scheduled:

<u><Analysis Number Link>: <Analysis Name Link></u>

Location: <Location>

Team Lead: <TeamLead>

Team: <Team>

Scheduled Start: <Scheduled Start Date>

Scheduled End: <Scheduled End Date>

✅ **Submitted for Review**: A notification is sent when the in progress stage of an Analysis is completed and the Analysis is still open (Analysis advances from in progress to a status other than Closed).

Subject: <Category> at <Location> ready for review

The following <Category> has been submitted for review by <ResponsiblePrevious>. <ResponsibleCurrent> is responsible for reviewing it.

<u><Analysis Number Link>: <Analysis Name Link></u>

Location: <Location>

Team Lead: <TeamLead>

- ✅ **Review Completed**: A notification is sent when the review of an Analysis is completed and the Analysis is still open (Analysis advances from Review to a status other than Closed).

Subject: <Category> review at <Location> has been completed

The following <Category> review has been completed by <ResponsiblePrevious>. <Status> is the next required step, which is the responsibility of <ResponsibleCurrent>.

<Analysis Number Link>: <Analysis Name Link>

Location: <Location>

Team Lead: <TeamLead>

- ✅ **Ready for Closure**: A notification is sent when Analysis Closure represents the next workflow stage.
  (This email might make more sense if actions need to be closed before the Analysis can be closed).

Subject: <Category> #<AnalysisNumber> is ready for closure

Final closure is required by <ResponsibleCurrent>.

<Analysis Number Link>: <Analysis Name Link>

Location: <Location>

Team Lead: <TeamLead>

✅ **Closed**: A notification is sent when an Analysis has been closed.

Subject: <Category> at <Location> has been closed

The following <Category> has been closed by <ResponsiblePrevious>.

<u>[<Analysis Number Link>: <Analysis Name Link>](#)</u>

Location: <Location>

Team Lead: <TeamLead>

✅ **Revision Needed**: A notification that is sent when an Analysis is reverted to In Progress (Revision Needed button is pressed).

Subject: Revision needed for <Category> #<AnalysisNumber> at <Location>

<Last Reverted By> requested revisions for the following reason: <Revert Reason>. This analysis needs to be resubmitted by <ResponsibleCurrent> after revisions are made.

<u>[<Analysis Number Link>: <Analysis Name Link>](#)</u>

Location: <Location>

Team Lead: <TeamLead>

✔ **Reverted to Review**: A notification that is sent when an Analysis is reverted to review.

Subject: <Category> #<AnalysisNumber> at <Location> has been reverted to review

<Last Reverted By> requested revisions for the following reason: <Revert Reason>. This analysis needs to be resubmitted by <ResponsibleCurrent> after revisions are made.

<Analysis Number Link>: <Analysis Name Link>

Location: <Location>

Team Lead: <TeamLead>

✔ **Reverted to Pending Closure**: A notification that is sent when an Analysis is reverted to pending closure.

Subject: <Category> #<AnalysisNumber> at <Location>has been reverted to pending closure

The following <Category> has been reverted back to the pending closure stage, which is the responsibility of <ResponsibleCurrent>.

<Analysis Number Link>: <Analysis Name Link>

Location: <Location>

Team Lead: <TeamLead>

- **Team Lead reassigned**: A notification that is sent when Analysis Team Lead is reassigned. When recipient role assigned = 'Analysis Team Lead', the distribution will include both to the old responsible and the new responsible persons.

Subject: Team Lead of <Category> at <Location> has been reassigned

The team lead of the following <Category> has been reassigned from <PreviousTeamLead> to <CurrentTeamLead>.

<Analysis Number Link>: <Analysis Name Link>

Location: <Location>

Team Lead: <TeamLead>

- **Review reassigned**: A notification that is sent when responsibility for review is reassigned while status is review. When recipient role assigned = 'Responsible for Review', the distribution will include both to the old responsible and the new responsible persons.

Subject: Review of <Category> at <Location> has been reassigned

Responsibility for review of the following <Category> has been reassigned from <ResponsiblePrevious> to <ResponsibleCurrent>.

<Analysis Number Link>: <Analysis Name Link>

Location: <Location>

Team Lead: <TeamLead>

✔ **Closure reassigned**: A notification that is sent when responsibility for closure is reassigned while status is pending closure. When recipient role assgined = 'Responsible for Closure', the distribution will include both to the old responsible and the new responsible persons.

Subject: Closure of <Category> at <Location> has been reassigned

Responsibility for closure of the following <Category> has been reassigned from <OldResponsible> to <NewResponsible>.

<Analysis Number Link>: <Analysis Name Link>

Location: <Location>

Team Lead: <TeamLead>

Reminder Notifications

⊘ **Scheduling Reminder**: A notification that is sent if <Category> has not been started X days before Scheduled start.

Subject: <Category> reminder

The following <Category> is scheduled:

<Analysis Number Link>: <Analysis Name Link>

Location: <Location>

Team Lead: <TeamLead>

Scheduled Start: <Scheduled Start>

Safety Meeting
Immediate Notifications

🅥 **Meeting scheduled**: When a meeting is scheduled, the organizer and all attendees are notified.

Subject: <Title> scheduled for <Location>

The following <meeting type> <meeting category> has been scheduled:

<u>Meeting Number Link></u>

Leader: <Display Name>(, <Display Name>...)

Date: <Date>

Time: <Start Time> - <End Time>

(Additional information: <Location Information>)

<AssignedBy> has assigned the following <recurring> <Source Type> action item which is due on <DueDates>.

✓ **Meeting information changed**: Whenever meeting information (date, time or location) has changed, the organizer and all attendees are notified.

Subject: <Title> has been changed

The following <meeting type> <meeting category> has been updated:

<Meeting Number Link>

Leader: <Display Name>(, <Display Name>...)

Date: <Date>

Time: <Start Time> - <End Time>

(Additional information: <Location Information>)

✓ **Attendee added**: When an attendee is added to a scheduled meeting, a notification is sent to them with the session information.

Subject: <Title> scheduled for <Location>

The following <meeting type> <meeting category> has been scheduled:

<Meeting Number Link>

Leader: <Display Name>(, <Display Name>...)

Date: <Date>

Time: <Start Time> - <End Time>

(Additional information: <Location Information>)

✅ **Attendee removed**: When an attendee is removed from a scheduled meeting, a notification is sent to them.

Subject: <Title> scheduled for <Location> - Update

You are no longer required to attend this <meeting type> <meeting category> :

<u>[Meeting Number Link]</u>

Leader: <Display Name>(, <Display Name>...)

Date: <Date>

Time: <Start Time>

(Additional information: <Location Information>)

✅ **Meeting minutes**: When a meeting has been closed, the organizer and attendees are emailed the meeting minutes.

Subject: <Title> is finished

<Title> has finished. This email is a record of the meeting.

<print summary>

✔ **Meeting canceled**: When a meeting is canceled, the organizer and attendees are notified.

Subject: <Title> for <Location> canceled

The following <meeting type> <meeting category> has been canceled:

<u><Meeting Number Link></u>

Leader: <Display Name>(, <Display Name>...)

Date: <Date>

Time: <Start Time>

Please remove any calendar entries you created for this meeting.

![VelocityEHS logo]

Reminder Notifications

✅ **Meeting not yet closed**: When a meeting is scheduled in the past, but not closed, the creator will be notified that they should close the meeting (so as to send out the minutes to the attendees).

Subject: <Title> is waiting

The following <meeting type> <meeting category> is still waiting for attendance information and topic and action updates. Meeting minutes will not be sent to attendees until the <meeting type> is closed.

<Meeting Number Link>

Leader: <Display Name>(, <Display Name>...)

Date: <Date>

Time: <Start Time>

To close the <meeting type> <meeting category> , please go to <Record Number> and close the meeting.

Training
Immediate Notifications

🔵 **Trainee added to session**: When a trainee is added to a session scheduled in the future, a notification is sent immediately with the session information.
Content Conditions:
- ▪ #1: If End Date/Time has been provided for that session.
- ▪ #2: If session location was provided.

Subject: Trainee(s) added to <Session Title> training session

The following trainee(s) have been added to the <Session Title Link> training session for <ApplicableLocation>:

<SessionTrainees>

Start: <ScheduledStartDateTime>

(See condition #1 End: <ScheduledEndDateTime>)

(See condition #2 Additional Location Information: <SessionLocation>)

Created By: <SessionCreator>

✔ **Session capacity reached**: When the capacity for a session has been reached, the session creator is notified with the session information.

Content Conditions:
- #1: If End Date/Time has been provided for that session.
- #2: If session location was provided.

Subject: Training session capacity reached

The capacity has been reached for a training session, <u><Session Title Link></u>, for <Applicable Location>.

Start: <ScheduledStartDateTime>

(See condition #1 End: <ScheduledEndDateTime>)

(See condition #2 Additional Location Information: <SessionLocation>)

Created By: <SessionCreator>

✔ **Trainer assigned to session**: When a trainer is added to a session scheduled in the future, a notification is sent with the session information.
Content Conditions:
- #1: If End Date/Time has been provided for that session.
- #2: If session location was provided.

Subject: Trainer added to <Session Title> training session

<SessionTrainers> has been added as a trainer for the <u>\<Session Title Link\></u> training session for <ApplicableLocation>.

Start: <ScheduledStartDateTime>

(See condition #1 End: <ScheduledEndDateTime>)

(See condition #2 Additional Location Information: <SessionLocation>)

Topic(s): <SessionTopics>

Created By: <SessionCreator>

✓ **Session canceled**: When a session has been canceled, all attendees and trainers assigned to the session will be notified with session information.
Content Conditions:
- #1: If End Date/Time has been provided for that session.
- #2: If session location was provided.

Subject: Cancellation of <Session Title> training session

The <Session Title Link> training session for <Applicable Location> has been canceled.

Reason for Cancelation: <SessionCancelReason>

Start: <ScheduledStartDateTime>

(See condition #1 End: <ScheduledEndDateTime>)

(See condition #2 Additional Location Information: <SessionLocation>)

Created By: <SessionCreator>

✓ **Session information changed**: A notification that is sent whenever information in a session has been changed; date, time, location. This notification is intended for all trainers or attendees registered for a session.
Content Conditions:
- #1: If End Date/Time has been provided for that session.
- #2: If session location was provided.

Subject: Revision to <SessionTitle> training session

Information has been modified for the <Session Title Link> training session for <Applicable Location>.

Start: <ScheduledStartDateTime>

(See condition #1 End: <ScheduledEndDateTime>)

(See condition #2 Additional Location Information: <SessionLocation>)

Created By: <SessionCreator>

✅ **Trainee removed from session**: A notification informing a user that they have been unregistered from a session and are no longer required to attend.
Content Conditions:
- #1: If End Date/Time has been provided for that session.
- #2: If session location was provided.

Subject: Trainee removed from <SessionTitle> training session

The following trainees have been removed from the <Session Title Link> training session for <ApplicableLocation>:

<SessionTrainees>

Start: <ScheduledStartDateTime>

(See condition #1 End: <ScheduledEndDateTime>)

(See condition #2 Additional Location Information: <SessionLocation>)

Created By: <SessionCreator>

✔ **Trainee absent from session**: A notification informing when one or more trainee's did not attend a session.

Content Conditions:

- ▪ #1: If End Date/Time has been provided for that session.
- ▪ #2: If session location was provided.

Subject: Trainee(s) absent from <SessionTitle> training session

The following trainee(s) did not attend the <u>Session Title Link</u> training session for <ApplicableLocation>:

<SessionTrainees>

Start: <ScheduledStartDateTime>

(See condition #1 End: <ScheduledEndDateTime>)

(See condition #2 Additional Location Information: <SessionLocation>)

Created By: <SessionCreator>

✅ **Trainer removed from session**: A notification to users if they have been removed from training a topic for a scheduled session.

Content Conditions:

- #1: If End Date/Time has been provided for that session.
- #2: If session location was provided.

Subject: Trainer removed from <SessionTitle> training session

<SessionTrainers> has been removed as the Trainer on some or all of the topics in the <u>Session Title Link</u> training session for <ApplicableLocation>.

Start: <ScheduledStartDateTime>

(See condition #1 End: <ScheduledEndDateTime>)

(See condition #2 Additional Location Information: <SessionLocation>)

Topic(s): <SessionTopics>

Created By: <SessionCreator>

✓ **Requirement changed**: A notification informing users when a requirement has been changed or made inactive.

Subject: Training requirement changed for <Location>

There has been a change to the training requirement for <u>[Requirement Topic Link]</u> at <Location>.

Requirement Number: <u>[Requirement Number Link]</u>

Classification: <RequirementClassTitle>

Last Edited by: <RequirementLastEditedBy>

Last Edited date: <RequirementLastEditedDate>

<ReasonForNewVersion>

Recurring Summary Notifications

✅ **Summary of training due in 30 days**: This will include a summary of all requirements and applicable people coming due within the next X days.
Content Conditions:
  - #1: If trainee has done all the hours portion of their requirement but has not met the verification.

Subject: Training requirements nearing due date at <Location>

The following requirement(s) for <Location> are coming due in the next x days:

<RequirementTopic>

(See Condition 1: <Trainee Link>* - <Requirement Class Title Link> - <RequirementDue>)

* If an asterisk appears beside a trainee's name, they have participated in applicable training however the requirement has not been fully met.

✔ **Summary of overdue requirements**: A summary of training requirements that are x days overdue or more at a location.

Content Conditions:

- #1: If trainee has done all the hours portion of their requirement but has not met the verification.

Subject: Overdue training requirements at <Location>

The following training requirement(s) for <Location> have passed their due date for the following people:

<RequirementTopic>

(See Condition 1: <u>Trainee Link</u>* - <u>Requirement Class Title Link</u> - <RequirementDue>)

* If an asterisk appears beside a trainee's name, they have participated in applicable training however the requirement has not been fully met.

Reminder Notifications

✅ **Training session approaching**: When a session is approaching, applicable recipients will be notified X days before the session occurs.
Content Conditions:

- #1: If End Date/Time has been provided for that session.
- #2: If session location was provided.

Subject: <SessionTitle> training session approaching

The <u><Session Title Link></u> training session is approaching in <X days/24 hours> for <ApplicableLocation>.

Start: <ScheduledStartDateTime>

(See condition #1 End: <ScheduledEndDateTime>)

(See condition #2 Additional Location Information: <SessionLocation>)

Trainer: <SessionTrainers>

Expected Attendees: <SessionTrainees>

Topic(s): <SessionTopics>

Created By: <SessionCreator>

✓ **Session requires results**: When a session is past its scheduled day, a notification will be sent X days after the date to notify users that results must be entered, or a session should be closed.

Content Conditions:
- #1: If End Date/Time has been provided for that session.
- #2: If session location was provided.

Subject: Results/closure pending on <SessionTitle> training session

The scheduled date for <Session Title Link> training for <ApplicableLocation> has passed and the session has not been closed. Ensure applicable results are entered on the session and it is closed.

Start: <ScheduledStartDateTime>

(See condition #1 End: <ScheduledEndDateTime>)

(See condition #2 Additional Location Information: <SessionLocation>)

Trainer(s): <SessionTrainers>

Topic(s): <SessionTopics>

Created By: <SessionCreator>

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Performance Metrics
Reminder Notifications

🗸 **Metric data required**: A notification that is sent X days after the first day following the end of a period associated with a metric for a location if the data has not been provided.

Subject: Metric Data Required

The following metrics require data entry at <Recipient's Location(s)>:

Location: <Location>

Metric: <Metric>

Period: <Overdue Period Link>

Last Entry: <Author> - <Most Recent Period Entered>

Location: <Location>

Metric: <Metric>

Period: <Overdue Period Link>

Last Entry: <Author> - <Most Recent Period Entered>

…

This notification is assigned for distribution to the following: <List of Roles> and <X> individual<s>

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Action Item
Immediate Notifications

✅ **Action item submitted**: A notification that is sent when an action item is submitted.

Subject: You are responsible for a new action item at <Action Item Location>

<AssignedBy> has assigned the following <recurring> <Source Type> action item which is due on <DueDates>.

<u><Action Item Number Link>: <Action Item Title Link></u>

<Required for startup/Blank> (MOC only)

Person Responsible: <Responsible>

Person Delegated: <Delegated>

✅ **Action item reopened**: A notification that is sent when an action item is reopened.

Subject: Action item at <Action Item Location> has been reopened

The following <Source Type> action item due on <DueDate> has been reopened.

<u><Action Item Number Link>: <Action Item Title Link></u>

<Required for startup/Blank> (MOC only)

Person Responsible: <Responsible>

Person Delegated: <Delegated>

✅ **Person Responsible changed**: A notification that is sent when the Person Responsible on an action item is changed while status is Open. When recipient role assigned = 'Person Responsible', the distribution will include both to the old responsible and the new responsible persons.

Subject: Person responsible changed for action item at <Action Item Location>

The person responsible on the following <recurring> <Source Type> action item, due on <DueDates>, has been changed to <Responsible>.

[<Action Item Number Link>: <Action Item Title Link>](#)

<Required for startup/Blank> (MOC only)

✅ **Person Delegated changed**: A notification that is sent when the Person Delegated on an action item is changed (including from blank) while status is Open. When recipient role assigned = 'Person Delegated', the distribution will include both to the old delegated and the new delegated persons.

Subject: Action item at <Action Item Location> has been assigned or reassigned

<Delegated> has been assigned to complete the following <recurring> <Source Type> action item, due on <DueDates>.

[<Action Item Number Link>: <Action Item Title Link>](#)

<Required for startup/Blank> (MOC only)

✅ **Due date(s) changed**: A notification that is sent when the Due Date or Recurrence on an action item is changed while status is Open.

Subject: Due date(s) changed for action item at <Action Item Location>

<Edited By> has changed the due date(s) on the following <recurring> <Source Type> action item to <Due Dates>.

<Action Item Number Link>: <Action Item Title Link>

<Required for startup/Blank> (MOC only)

Person Responsible: <Responsible>

Person Delegated: <Delegated>

✅ **On due date**: A notification that is sent on the Due Date if action item still open.

Subject: Action item at <Action Item Location> due today

The following <Category> started on <Start Date> has not been updated in <DaysNoActivity> days.

The following <Source Type> action item is due today.

<Action Item Number Link>: <Action Item Title Link>

<Required for startup/Blank> (MOC only)

Person Responsible: <Responsible>

Person Delegated: <Delegated>

✔ **Deleted**: A notification that is sent when an action item is deleted.

Subject: Action item at <Action Item Location> has been deleted

The following <Source Type> action item due on <DueDate> has been deleted.

<Action Item Number Link>: <Action Item Title Link>

<Required for startup/Blank> (MOC only)

Person Responsible: <Responsible>

Person Delegated: <Delegated>

✔ **Action item closed**: A notification that is sent when an action item has been closed.

Subject: Action item at <Action Item Location> has been closed

The following <SourceType> action item due on <DueDate> has been closed.

<Action Item Number Link>: <Action Item Title Link>

<Required for startup/Blank> (MOC only)

Person Responsible: <Responsible>

Person Delegated: <Delegated>

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Recurring Summary Notifications

✅ **Summary of new action items**: Summary of action items submitted since the last summary notification, ordered by Source (where Source = Standalone, Incident, Audit/Inspection etc.). Being included are all action items assigned at the location of the notification, when the recipient represents a Name. Only action items in recipient's area of responsibility get included, when the notification is assigned to a Role.

Subject: Summary of new action items

The following action items were assigned at <Recipient's Location(s)> in the last <X days/24 hours>:

<Action Item Number Link>: <Action Item Title Link>

Location: <Action Item Location>

Due Date(s): <DueDates>

Assigned By: <AssignedBy>

<Action Item Number Link>: <Action Item Title Link>

Location: <Action Item Location>

Due Date(s): <DueDates>

Assigned By: <AssignedBy>

...

This notification is assigned for distribution to the following: <List of Roles> and <X> individual<s>

✅ **Summary of overdue action items**: Summary of action items overdue; summary email is repeated every X days and includes only action items from the location where the notification was defined.

Subject: Summary of overdue action items

The following action items are overdue at <NotificationLocations>:

<u>[Action Item Number Link](#)</u>

<RecurrenceRule>

<Days>

Description: <TaskDescription>

Person Responsible: <Responsible>

Person Delegated: <Delegated>

<u>[Action Item Number Link](#)</u>

<RecurrenceRule>

<Days>

Description: <TaskDescription>

Person Responsible: <Responsible>

Person Delegated: <Delegated>

…

This notification is assigned for distribution to the following: <List of Roles> and <X> individual<s>

✅ **Summary of open action items**: Summary of action items open; summary email is repeated every X days. Includes action items from the location (and below) where the notification was defined.

Subject: Summary of open action items

The following action items are open at <NotificationLocations>:

<Action Item Number Link>

<RecurrenceRule>

<Days>

Description: <TaskDescription>

Person Responsible: <Responsible>

Person Delegated: <Delegated>

<Action Item Number Link>

<RecurrenceRule>

<Days>

Description: <TaskDescription>

Person Responsible: <Responsible>

Person Delegated: <Delegated>

…

This notification is assigned for distribution to the following: <List of Roles> and <X> individual<s>

Reminder Notifications

✅ **No activity**: A notification that is sent on open action items which are not updated in X days; the notification is repeatable.

Subject: Inactivity notification for action item at <Action Item Location>

The following <Source Type> action item has not been updated in <DaysNoActivity> days.

<Action Item Number Link>: <Action Item Title Link>

<Required for startup/Blank> (MOC only)

Due Date: <DueDate>

Person Responsible: <Responsible>

Person Delegated: <Delegated>

✅ **Due date approaching**: A notification that is sent on action items which are still open X days before the Due Date. Please note the notification is skipped if reminder date is earlier than the creation date for the action item. E.g. If escalating reminders have been configured to go out 15 and 7 days before the due date, for an action ietm created on March 1st and due on March 10th, only the second reminder will be sent.

Subject: Action item reminder

The following <Source Type> action item at <Action Item Location> is due on <DueDate>.

<Action Item Number Link>: <Action Item Title Link>

<Required for startup/Blank> (MOC only)

Person Responsible: <Responsible>

Person Delegated: <Delegated>

✔ **Overdue**: A notification that is sent on action items which are still open X days after the Due Date.

Subject: <DaysOverdue>-day overdue action item

The following <Source Type> action item at <Action Item Location> has not been completed.

<Action Item Number Link>: <Action Item Title Link>

<Required for startup/Blank> (MOC only)

Person Responsible: <Responsible>

Person Delegated: <Delegated>

Data Import
Immediate Notifications

🔵 **Import Complete**: When an import is complete, it sounds out the import summary.

Subject: <category> import complete

The <category> import is complete.

<u>[Record Number Link]</u>

Imported by: <DisplayName>

Start: <Date and time first moved to Validating>

Finish: <Date and time moved to Closed or Canceled>

<Category> Import Summary:

<updated category import summary>

✔ **Import ready for confirmation**: When an import enters the Confirmation state, needs to be confirmed before progressing. Any errors should be reviewed.

Subject: <category> import in progress. Review errors.

The <category> import has begun and needs to be confirmed. Any errors can be corrected in the grid on the Errors tab and your updates can be submitted for review. Or, you can finish this import and export the errors so that you can correct them offline and import the corrected file later.

<Record Number Link>

Imported by: <DisplayName>

Start: <Date and time first moved to Validating>

Finish:

<Category> Import Summary:

<updated category import summary>

✔ **Import Cancelled**: When an import is canceled, it sounds out the import summary or reason why.

Subject: <Category> import canceled

The <category> import was canceled.

<u><Record Number Link></u>

Imported by: <DisplayName>

Start: <Date and time first moved to Validating>

Finish: <Date and time moved to Canceled>

(Import Summary:

<import summary>)

(The columns listed in the header did not match the template, or the file contained no data rows.)

Reminder Notifications

✔ **No activity**: When an import is awaiting confirmation, the creator will be notified.

Subject: <Category> import is incomplete

The <category> import began <X> days ago and needs to be confirmed. Any errors can be seen on the Errors tab of the import.

<Record Number Link>

Imported by: <DisplayName>

Start: <Date and time first moved to Validating>

Finish:

<Category> Import Summary:

<updated category import summary>