# Policy Manager Notifications

We will provide an overview of available Policy Manager notifications.

Notifications are attached to Policy Manager permissions and there are some caveats which are explained below.

To find out more, check out our guide on Policy Manager permissions.

Templates for each language can be viewed and edited from **Admin > System > Localisation > Edit templates > Policy Manager**.
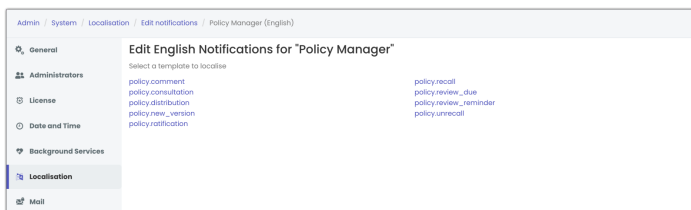


## Notification not sending?

**Remember:** The type of notification received by users e.g. email, in-system, none etc will depend on their preferences as outlined here.

If a notification is not evident, check that the recipient's preferences are correct to receive this how they would expect.
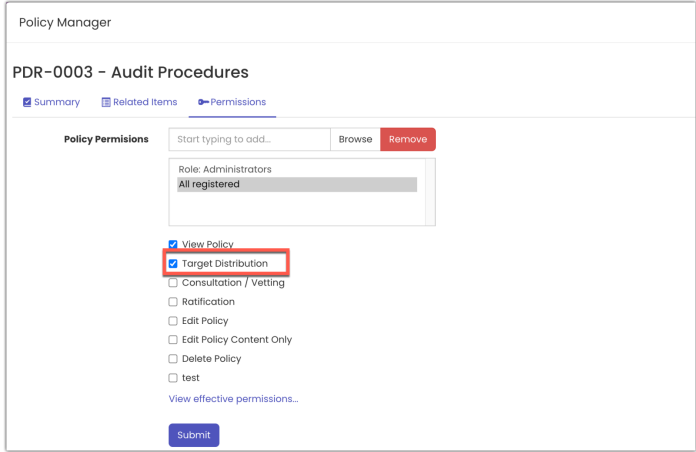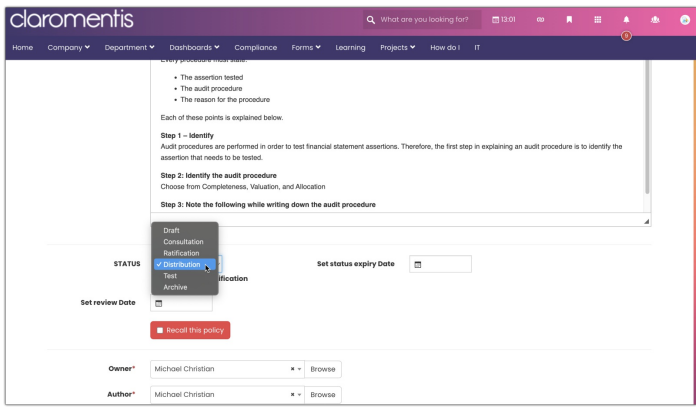
## Standard Notifications

**To accept/deny a Policy**

**policy.distribution**



This notification will fire when a Policy has been put into 'Distribution' status (it has been made live) and the recipients will be users with 'Target Distribution' permission so that they can read and accept the policy.

**Please note:** The user that moves the policy into distribution status will NOT receive a notification even if they are in 'target distribution' permission.

## Send reminder

This feature can be used by an administrator to send the distribution email template to any users who have not yet accepted the policy.
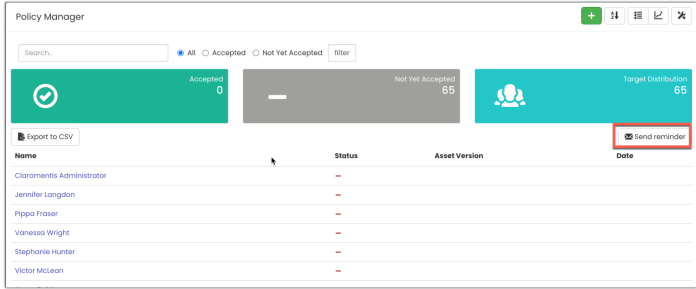


## policy.new_version



This notification will fire when a new Policy version has been uploaded (for an existing Policy) and the recipients will be users with 'Target Distribution' permission so that they can read and accept the new version of the Policy.
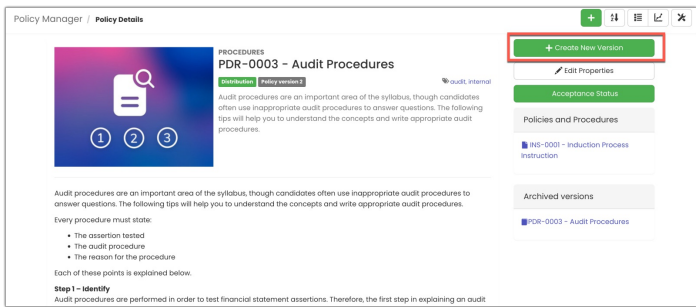
**Please note:** The user that creates the new policy version will NOT receive a notification even if they are in 'target distribution' permission.
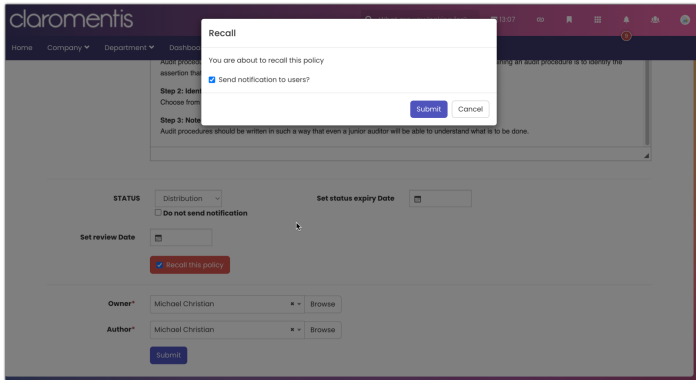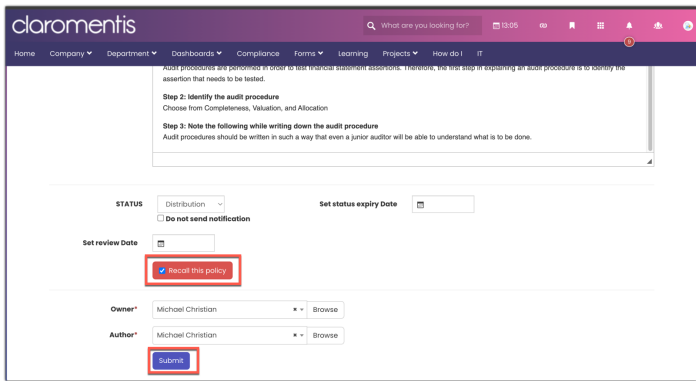
## To recall a Policy

**policy.recall**



This notification will fire when a Policy is put into 'Recall', a pop-up will appear to allow the administrator to choose whether to send a notification or not.

If this is chosen the notification will be sent to all users in the 'Target Distribution' permission.





**policy.unrecall**

This notification will fire when a Policy is reactivated (when it was previously recalled), and a pop-up will appear to allow the administrator to choose whether to send a notification about this or not.

If this is chosen the notification will be sent to all users in the 'Target Distribution' permission.



## Caveats for acceptance notifications

If you were expecting acceptance (distribution, new version templates above) notification from the Policy Manager that was not received this is due to either:

1. The action being performed was expected to trigger an email that doesn't in reality
2. User notification preferences are set so these are not being generated in the format they expect e.g. they have preferences set to send notifications to the in-system messenger only and not email (either by default or for Policy Manager as a whole)

Use the below criteria to check the action you are performing is expected to trigger a notification, and separately to confirm that the user expected to receive this has their preferences set correctly.

**Policy acceptance notifications will be sent to users in the target distribution:**

- In the format chosen in user notification preferences e.g. in system, email, both
- When a policy is put into 'distribution' status
- When a new policy version is created
- When the 'send reminder' feature is used for users who have not yet accepted the policy

**Policy acceptance notifications will not be sent:**

- To users added to the target distribution in a policy that is already live (in 'Distribution')
- To the user who makes a policy live (whether for a new policy overall or a new version of an existing policy) even if they are in the 'Target Distribution'
- To the user who sends a reminder, even if they have not yet accepted the policy they send the reminder for

**If a review date has been set on a Policy**

**policy.review_reminder**
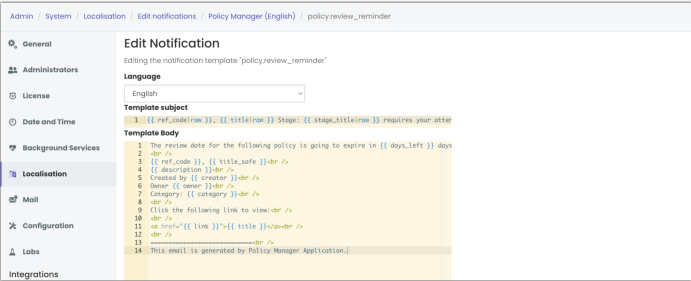
This notification will fire 15 days before the entered review date and will be received by users with the 'Edit Policy' permission to the Policy so they can action this.
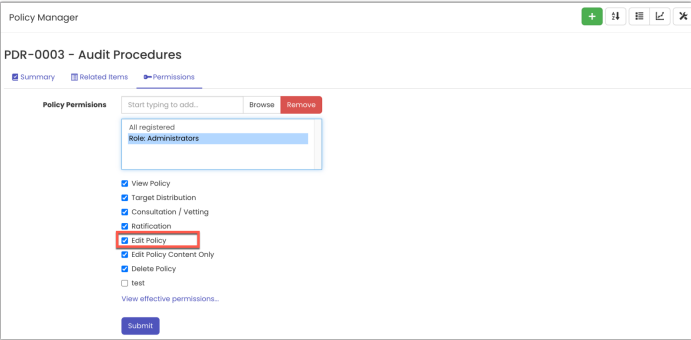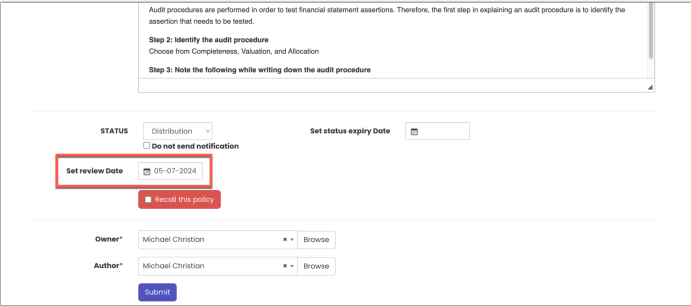




**policy.review_due**

This notification will fire on the day the Policy expires and will be received by users with the 'Edit Policy' permission to the Policy so they can action this.



# If your team set up an approval process in Policy Manager

The labels of statuses Policies can move through can be renamed as well as one extra status (between 'Distribution' and 'Archive') included if required.

If renamed or made active, the label will update in the permissions box to the new title.

The notifications for each status work the same and will have the updated title showing in them when received (if changed from the default title)

The statuses can be edited from **Admin > Policy Manager > Statuses**:

This is an optional feature, as your team may not require an approval process, in which case the standard 'Draft' and 'Distribution' statuses alone can be used.

**policy.consultation**



This notification will fire when a Policy has been put into 'Consultation' status and will be sent to user(s) with permission to that status of the approval process so they can approve/reject the policy.

This status can be renamed, and if it has the notification will reflect that title and not 'Consultation' which is the default.



**policy.comment**



This notification will fire when a comment is added to a Policy that is in a status that requires approval.

Recipient(s) will be the user(s) with permission to that status of the approval process when approving/rejecting the policy.
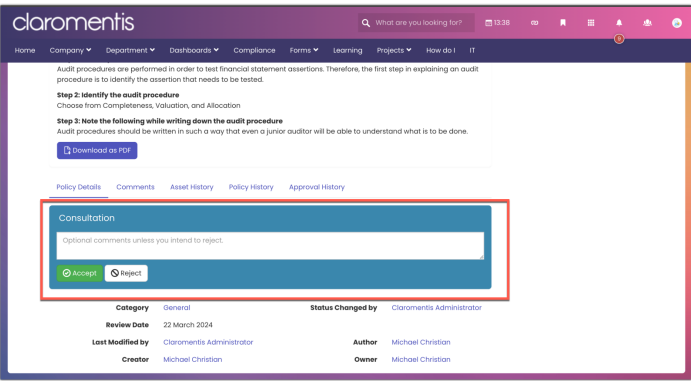
**policy.ratification**



This notification will fire when a Policy has been put into 'Ratification' status and will be sent to user(s) with permission to that status of the approval process when approving/rejecting the policy.

This status can be renamed, and if it has the notification will reflect this title and not 'Ratification' which is the default.



---

Created on 15 March 2024 by Hannah Door. Last modified on 23 May 2024
Tags: notification, policy, policy manager