[TO-3682] Jira: Update Offboarding automation Created: 19/Mar/25 Updated: 28/Mar/25

Status:	TICKET RESOLVED
Project:	Technology Operations Board
Components:	None
Fix versions:	None

Type:	Maintenance	Priority:	Low
Reporter:	Lori Reorowicz	Assignee:	Solounge Bowen
Resolution:	Unresolved	Votes:	0
Labels:	None		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original estimate:	Not Specified		

Issue links:	**Blocks**			
	is blocked by	TSD-43815	Leave of Absence - test test, - 3/27...	Follow Up Needed
	Post-Incident Reviews			
	reviews	HR-3129	Offboarding - test Test - 2025-03-21	Done
	reviews	HR-3130	Offboarding - tes 2 test 2 -	Done
	reviews	HR-3131	Offboarding - tes 2 test 2 -	Done
Office/Clinic Location:	Remote - Home Office			
Vendor / Issue Type:	Jira/Atlassian			
Key Performance Indicator:	Improved User Experience			
KPI Measure:	The automation for LOA sends an email to the SD Supervisor when the status is updated to "Follow Up Needed" with deactivation details and PeopleOps contact. Test successful, cc'd Lori.			
Vendor Ticket ID:	https://kindbody.atlassian.net/jira/servicedesk/projects/TSD/settings/automate#/rule/26762784/702032823			
Request participants:	None			

Description

When you have some time, could I ask you to create an automation for TSD (if this configuration is possible)?

This will be for Offboarding/LOA ticket types.

Trigger only if **Offboard/LOA** field is set to *Leave of Absence*.

When status is updated to *Follow Up Needed* then send email to **SD Supervisor** (email in field in ticket) with the following information:

[*SD First Name*] [*SD Last Name*] has been deactivated for a Leave of Absence until their estimated return to work date [*Estimated Return to Work*].

The following systems have been temporarily deactivated:
Google (Gmail, Calendar, etc...)
Slack
KindEMR **unless direction was given to keep active

Emails are being forwarded to you at this time. Please reach out to peopleops@kindbody.com if you have any questions about this employee's leave of absence.

Issue created in Slack from a message.

Comments

Comment by Solounge Bowen [27/Mar/25]

- Created an automation named **LOA: send email to Supervisor**
- Created a global custom field for SD Supervisor so that it can be a user picker field
- Ran a test and it went successful, cc's Lori for visiblity.

Comment by Solounge Bowen [27/Mar/25]

Link to automation: https://kindbody.atlassian.net/jira/servicedesk/projects/TSD/settings/automate#/rule/26762784/702032823