

Defining Who Receive Reminder Emails

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If you have Notification emails enabled for the 5500, Documents, Messaging and/or Compliance modules, then Portal User Reminder emails are sent to the specific portal user(s) every X number of days for each enabled module regarding the overdue items in the portal user's ToDo list.

Note: If portal user reminders are set to 0, the portal user reminder emails will not be sent and the follow-up reminder emails will be sent every X number of days instead.

For example, in the screen shot below, the portal user would not receive a reminder email, but the TPA would receive the follow-up every 5 days for the Messaging module and every 4 days for the Document module.

Module	Enable	Portal User Reminder Days	Followup Reminder Days
Messaging	Yes	0	5
Documents	Yes	0	4

Note: Email settings, such as the DEFAULT ftwilliam.com Emails, Specify a Server, and User Messaging Settings, only affect portal user reminder emails. Follow-up emails are always sent from donotreply@ftwilliam.com.

Email/Server Settings

Enable for Messaging: Yes ▾
†Portal User: 0
Reminder Days:
†Followup Reminder Days: 5

Enable for Documents: Yes ▾
†Portal User: 0
Reminder Days:
†Followup Reminder Days: 4

Enable for 5500: Yes ▾
†Portal User: 3
Reminder Days:
†Followup Reminder Days: 2

Enable for Compliance: Yes ▾
†Portal User: 3
Reminder Days:
†Followup Reminder Days: 2

Email Sending Method: DEFAULT ftwilliam.com Email ▾
From Name: DEFAULT ftwilliam.com Email
From Email: Specify a Server
Reply To: Use Messaging Settings

cc: _____

Select
Email N
E-Sign
Followu
Remind
ToDo M