

# Defining Who Will Receive Follow-Up Emails

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Follow-Up reminders are sent to assigned Admins or confirmation email addresses at X number of days after the reminder email was sent to the portal user.

**Note:** If the numbers for the portal user reminders and follow-up reminders add up to a value less than or equal to zero, follow-up reminders will not be sent out.

For example, in the screen shot below, both the portal user and TPA would not receive a reminder for the Messaging module. For the Document module, the portal user would receive a reminder email every 1 days, but the TPA would not receive a follow-up email because both values added together are less than zero. You would not be able to send a follow-up email 2 days prior to every 1 day for the portal user reminder email.

The screenshot shows a software interface with a top navigation bar containing tabs: Distributions, 5500, Messaging, Documents, Compliance, and Notifications. Below this is a window titled "Email/Server Settings".

Under "Email/Server Settings", there are two sections:

- Enable for Messaging:** A dropdown menu is set to "Yes". Below it are two spinner boxes: "†Portal User Reminder Days:" set to 0 and "†Followup Reminder Days:" set to 0.
- Enable for Documents:** A dropdown menu is set to "Yes". Below it are two spinner boxes: "†Portal User Reminder Days:" set to 1 and "†Followup Reminder Days:" set to -2.

To the right of the settings window is a vertical list of options: "Select", "Email", "E-Sign", "Follow", "Remin", and "ToDo".